



a part of you



The San Diego Foundation's purpose is to improve the quality of life within all of our communities by promoting and increasing responsible and effective philanthropy. Entrusted with this responsibility, we have a four-part mission. Our mission is to:

- Assist donors to BUILD and PRESERVE permanent assets for charitable purposes in all of San Diego's communities;
- MONITOR and ASSESS changing needs;
- Meet those NEEDS through financial awards and organizational support;
- CONVENE members of the community to PROMOTE creative dialogue and action on issues affecting our communities.



The San Diego Foundation Office Locations

- Main Office – Liberty Station (619) 235-2300
- Rancho Bernardo (858) 385-1595
- Solana Beach (760) 269-3880



Giving a part of ourselves for others is one of the greatest forms of generosity we can bestow. And those who make “giving” a part of their lives, find that the joy they bring to others leads to joy they feel themselves. At The San Diego Foundation, giving has been a part of our very core for over 30 years. It is a part of our donors, volunteers, staff, and of those we partner with. It is the way we think about our community and the world around us. Giving is a part of us that not only touches the lives of those we help, but it touches our own lives by becoming a part of who we are.

In the following pages we will introduce you to some of the people and organizations who have made giving a part of their lives. We will also introduce you to some of the beneficiaries of their endeavours.

While you are reviewing these pages, please take a moment and ask yourself, is it *a part of you?*

LETTER FROM THE FOUNDATION

IT HAS BEEN AN HISTORIC YEAR FOR THE SAN DIEGO FOUNDATION AND THE COMMUNITY WE SERVE.

At our 30th Anniversary Celebration, The Foundation launched *Endow San Diego* and announced the Nonprofit Partnership, an unprecedented alliance of nonprofit organizations building tens of millions of dollars in endowments that will become a permanent well of support for charitable causes now and for generations to come.

In the wake of these momentous events, The Foundation's volunteer North County Coastal and North County Inland Civic Alliances were established, and Regional Outreach staff began work in our new North County offices in Solana Beach and Rancho Bernardo.

This year saw a most important development for our generation as well as those to follow: the creation of the Fund for the Common Good. This endowment fund addresses the changing needs of our community now and far into the future, and it characterizes the San Diego Way: people caring for people, giving and making a difference.

Wrapping up the year, yet another milestone took shape: the purchase of a building to become home to The San Diego Foundation and the San Diego Women's Foundation. Please turn to page 4 to learn about this new center for charitable giving.

As The San Diego Foundation settles into its new home, we invite you to visit us, to participate by creating a charitable fund or

*...the San Diego Way:
people caring for people,
giving and making a difference.*

adding to the one you have, contributing to the Fund for the Common Good, becoming a Friend of The Foundation, and most importantly, supporting the causes and nonprofit organizations you love.



Bruce G. Blakley

BRUCE G. BLAKLEY, CPA

Chair of the
Board of Governors
2005-2007



Bob Kelly

BOB KELLY

President & CEO,
The San Diego Foundation

THE SAN DIEGO FOUNDATION

2006 ANNUAL REPORT

CARING FOR THE COMMON GOOD

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*We hope you will visit and feel at home
in The San Diego Foundation's new facility.*



HIGHLIGHTS FROM

2005-2006

A Move with Meaning

During this momentous 30th Anniversary Year, our Board of Governors made an historic decision: to purchase a building that would become the permanent home to The San Diego Foundation and the San Diego Women's Foundation. It is anticipated that this facility will house other foundations as well, and that it will become a true center for charitable giving for the San Diego region.

In October 2006, this facility came to life in the heart of Liberty Station adjacent to the NTC Foundation complex. Proximity to this historic locale, which is fast becoming a nonprofit hub, is an imminently appropriate location for The San Diego Foundation. As such, The Foundation's relocation can be considered a "move with meaning."

WE'RE GREEN!



In keeping with The San Diego Foundation's commitment to environmental conservation and cutting-edge technology, this project utilizes sustainable design and construction practices and technologies. The Foundation expects to receive LEED® Green Building Certification, a national standard emphasizing state-of-the-art strategies for energy efficiency, materials selection, water savings and indoor environmental quality.

At a Glance

GIFTS

Residents of San Diego County contributed **\$48 million** in outright gifts to new or existing funds, increasing The San Diego Foundation's capacity to strengthen the community.

GRANTS

The Foundation awarded a record-breaking **\$50 million** to nonprofit organizations. Nearly \$2.3 million was awarded in scholarships, which is more than the last two fiscal years combined.

NEW FUNDS

140 new funds were created, including 64 new endowments.

ASSETS

The Foundation's assets have grown 365% in the past decade – from \$137 million in 1996 to **\$500 million** in 2006 – placing The Foundation fifth among the community foundations in California and 22nd among more than 700 community foundations in the United States.

INVESTMENT RATE OF RETURN

1 Year	3 Year	5 Year	10 Year
10.3%	12.2%	6.7%	8.5%

REGIONAL OUTREACH

The San Diego region is made up of many towns and communities, each with its own personality and feel. As a region, we come together and use our collective strength to build a brighter future for everyone. That's what a community foundation is all about – neighbors coming together in their neighborhoods, school districts, and cities throughout San Diego County to enhance the common good.

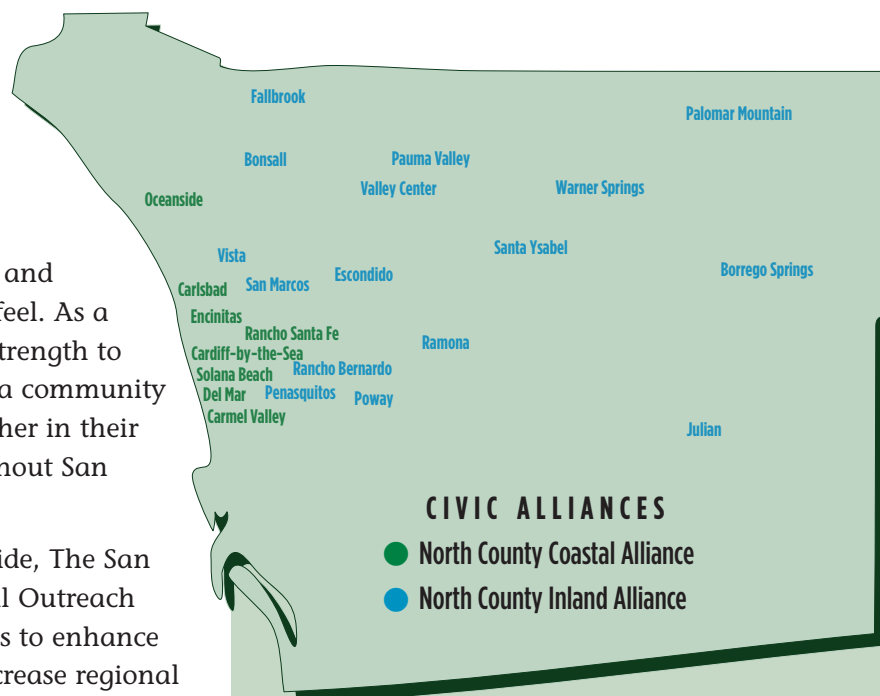
In an effort to better serve communities region-wide, The San Diego Foundation has embarked upon a Regional Outreach initiative. Through Regional Outreach, our goal is to enhance our understanding of issues facing the region, increase regional awareness of The Foundation and all that we offer, and increase endowments and charitable giving.

Civic Alliances

The San Diego Foundation has established Civic Alliances in the North County Inland and North County Coastal communities to further the mission of Regional Outreach. These volunteer committees are the first of several planned Civic Alliances that will eventually serve each geographic sector of the County.

Local Community Foundation Affiliates

The Foundation is also partnering with community leaders and residents to create local community foundation affiliates and to work with pre-existing community foundations to build their endowments. The Foundation affiliate model allows residents to direct their charitable giving to solve local issues while also addressing County-wide issues through affiliation with The San Diego Foundation. 2005-2006 saw the launch of **Escondido Cares – A Community Foundation**. Carlsbad is expected to follow suit in the coming year with their own affiliated community foundation.



Neighborhood Grants Program

In June 2006, the Civic Alliances created the Neighborhood Grants Program to foster neighborhood cooperation and connection. The Alliances will each distribute \$10,000 in grants to resident-initiated programs designed to enhance and stimulate interest in improving the quality of life in local neighborhoods.



Darcy Bingham, Foundation Board Member and Chair of the North County Coastal Civic Alliance



Jerry Hoffmeister, Foundation Board Member and Vice-Chair of the North County Coastal Civic Alliance



Jack Raymond and Barry Newman, Foundation Board Members and Chair and Member (respectively) of the North County Inland Civic Alliance

As the San Diego region's community foundation, it is essential for us to be present in the communities throughout the County.

BRUCE BLAKLEY, CHAIR,
THE SAN DIEGO FOUNDATION BOARD OF GOVERNORS

The Foundation Earns National Standards Seal

We are pleased to announce that The San Diego Foundation has been certified in compliance with the Council on Foundations' National Standards. You may have noticed the National Standards Seal on the front cover. This mark of distinction signifies the integrity of our organization and the quality of the services we provide to the community. Community foundations across the country are aspiring to attain the COF National Standards Seal, and to date, we are the only community foundation in San Diego County to receive it.



CONFIRMED IN COMPLIANCE WITH NATIONAL STANDARDS
FOR U.S. COMMUNITY FOUNDATIONS

"Adopting and adhering to high standards is the best way we can demonstrate our ongoing commitment to maintaining the trust of our donors and the entire community."

BOB KELLY, PRESIDENT & CEO, THE SAN DIEGO FOUNDATION

Congratulations to the San Diego Women's Foundation!

The San Diego Women's Foundation (SDWF) has topped \$1M in grants and \$1.4M in endowment. SDWF, a supporting organization of The San Diego Foundation, strengthens and improves women's capacities to engage in significant philanthropy in the San Diego region.



THE SAN DIEGO FOUNDATION'S HONORS IN THE PAST YEAR

43rd Annual Alonzo Horton Awards:

Humanitarian Award

BIOCOM:

Community Partner of the Year

San Diego Science Alliance:

Partner of the Year

American Marketing Association – San Diego Chapter:

American Marketer of the Year for a Special Event

For the 30th Anniversary Celebration

Public Relations Society of America –

Central Valley Chapter:

Merit Award for the Endow San Diego 8-page brochure

Endow San Diego

Of course, the major highlight from 2005-2006 was the launch of *Endow San Diego*!

Endow San Diego is a multi-year, community-wide initiative designed to inform and inspire San Diegans to understand and support endowment.

The Meaning: *Endow San Diego*

Last year, The San Diego Foundation sought a meaningful way to mark its milestone 'birthday,' its 30th Anniversary. In some parts of the world, birthdays are celebrated not by receiving gifts, but by giving them. The honoree celebrates by giving something of value to those who have gathered for the occasion. **On the 30th Anniversary of The San Diego Foundation, our gift to the community was *Endow San Diego*.**

An endowment preserves and increases a charitable gift permanently because the original gift is never spent. Only a portion of the earnings from its investment are granted out each year, so the endowment remains and grows. This is a powerful tool for leaving a legacy and supporting a beloved cause or organization in perpetuity.

The San Diego Foundation thanks its Partners in Philanthropy, QUALCOMM and KPBS for their generous support for *Endow San Diego*.

THE POWER OF ENDOWMENT

After an average of 20 years, an endowment fund will have granted out an amount equal to the original gift – and the original gift will have grown 50-300%, increasing the amount available for grantmaking with each passing year. It's the gift that truly keeps on giving!

The Blasker-Rose-Miah Fund*

Original gift (1992) \$ 8.9 million

Current value (2006) \$ 13.1 million

Total Grants \$ 5.1 million

* For grants made by the Blasker Fund this year, see pages 49 and 53.



The Message: *Endow Your Passion*

The "Endow Your Passion" multi-media campaign began building awareness of endowment on October 15, 2005, with the launch of the *Endow San Diego* website (www.endowsandiego.org) and television newscasts highlighting the work of our *Endow San Diego* Nonprofit Partners. Television, radio, direct mail and print advertising throughout the year yielded **over 14 million impressions** in the marketplace, augmented by regular news releases and broadcast features on Channel 10News.

The Milestones: *Nonprofit Partners and New Endowments*

The *Endow San Diego* Nonprofit Partnership is an unprecedented region-wide collaboration that encompasses nonprofit organizations of every size and mission, united in the single goal of building endowment. These visionary, dedicated organizations are creating sustainable support for their service to the community for generations to come.

Endow San Diego has engaged more than **200 Nonprofit Partners** and, as of October 2006, has generated nearly **150 new endowments** totaling **\$19 million**. Approximately half of the new endowments reside at The Foundation with the balance among our Nonprofit Partners throughout the region. For a listing of the *Endow San Diego* Nonprofit Partners, please visit www.endowsandiego.org.

The Movement: *Endow San Diego Spreads across the Region*

In addition to helping our Nonprofit Partners create and increase their endowment funds, The Foundation will assist individual communities in building **community-specific endowments**. Last year saw the creation of *Endow RB* (Rancho Bernardo). *Endow Oceanside* and *Endow Carlsbad* are expected to launch in the coming year. Just as an endowment enhances the long-term stability of an organization, a community endowment helps people preserve what they appreciate most about their community for future generations. With a sizeable community endowment, these towns will have funding—even during tough economic times—for their museums, parks and other community organizations.



30TH ANNIVERSARY CELEBRATION EVENT: WHERE TOMORROW BEGINS

On October 15, 2005, more than 1,400 people joined together to celebrate The San Diego Foundation's 30th Anniversary at the San Diego Convention Center. Guests enjoyed an extraordinary evening looking back on The Foundation's 30 years and looking ahead to what *Endow San Diego* can do for the future of our region.



HIGHLIGHTS FROM 2005-2006

- ◀ The Grinch, from The Old Globe Theatre's production of the Dr. Seuss tale, sang and danced in honor of donor Audrey Geisel.
- ▼ The Foundation recognized the important work of our founders, which included an acknowledgement speech by founding member and former Governor Pete Wilson.



◀ Bill Geppert, Foundation Board Member and Chair of *Endow San Diego*, spoke about the importance of endowment.

◀ ▲ The Celebration Event was chaired by Jane Trevor Fetter and co-chaired by Noreen Mulliken, along with a talented committee of over 45 dedicated volunteers.

◀ ◀ Joan Embery, world-renowned champion of wildlife and the environment, spoke about the role of endowment in preserving and protecting our environment for future generations.

◀ ◀ ▲ Children holding Joan Embery's wildlife ambassadors accompanied her on stage.

*Thank You to our
30th Anniversary
Title Sponsor*



*and
Partners in Philanthropy*



THE FUND FOR THE COMMON GOOD

The Fund for the Common Good is a group of unrestricted or “common good” funds that enable The San Diego Foundation to respond strategically to community issues and needs and, thereby, help to build a better community.

The San Diego Foundation’s core value is serving the common good of the San Diego region. We identify the common good as the total of all the conditions that make it possible for men, women and children to maximize their potential as human beings.

Based on our community knowledge and research, The Foundation utilizes the **Fund for the Common Good** to support projects that are impactful, have important goals, achieve measurable results and develop future leaders.

The San Diego Foundation is grateful to the visionary individuals and families who create Common Good Funds to meet the needs of our region – even beyond their own lifetimes. Their generosity and care for the common good motivated them to leave legacies that will continue to grow and benefit thousands of lives each year.



FIELD OF INTEREST FUNDS

Field of Interest Funds are a type of Common Good Fund that support broad subject areas, providing grants to serve a cause or geographical location that the donor holds dear.

Field of Interest Funds by Subject Area

Supporting the Community Impact Grants Program (page 42).

- **Arts & Culture**
- **Civil Society**
- **Environment**
- **Health & Human Services**
- **Organizational Success**
- **Scholarships**
- **Science & Technology**

Field of Interest Funds by Geographic Area

• **Balboa Park**

The Balboa Park Endowment at The San Diego Foundation is a group of permanent funds established by concerned citizens. Some donors have chosen to support the general enhancement and beautification of the Park, while others have designated a particular focus, such as flowers, trees or sidewalks.

• **Mission Bay Park**

Drawn by 4,600 acres and 32 miles of shoreline, thousands of residents and visitors flock to Mission Bay Park each year. Created in 1987, the Mission Bay Park Endowment Fund is a Field of Interest Fund that seeks to foster public appreciation by supporting efforts to enrich, preserve and improve the park.

We welcome your contribution to these Field of Interest Funds at The San Diego Foundation.

VISION OF THE COMMON GOOD

The San Diego Foundation's vision is a community in which...

- The "San Diego Way" prevails: people care about the common good;
- There are always expectations for a better future;
- There are good jobs for all adults;
- Every child has a secure, healthy, nurturing family and excellent educational opportunities;
- All people are welcomed and respected regardless of age, race, religion and circumstance;
- Access to high-quality, diverse educational institutions enables all citizens to maximize their potential as human beings;
- Arts, culture and the humanities are valued and shared;
- Neighbors help neighbors;
- All people have access to quality health care;
- Our neighborhoods and streets are safe;
- There are abundant parks and wild places;
- The air and land are clean, and our lakes, streams and coastal waters are swimmable, fishable and surfable;
- Natural, open spaces can sustain the unparalleled diversity of native plants and animals; and
- All people enjoy their later years with comfort, dignity and respect.

FRIENDS OF THE FOUNDATION

CARING FOR THE COMMON GOOD

F*riends of The Foundation* is a membership program of The San Diego Foundation that supports the **Fund for the Common Good** and our **Community Impact Grants Program**.



Friends of The Foundation is an easy and effective way to support many nonprofit organizations making a difference throughout the San Diego region. Friends may give to address a particular priority area or for greatest community needs, allowing The Foundation to invest their donation where it is needed most. Either way, a gift to Friends is a gift to the entire community!

The following people joined or renewed as *Friends of The Foundation* between July 1, 2005 and June 30, 2006. We sincerely thank them for their kind and generous gifts to support the Fund for the Common Good.



Partner - \$5,000

Mary H. Clark
Norma L. Smith - [IN MEMORY OF DONALD R. SMITH](#)
Jim and Kathy Whistler

Champion - \$2,500

Dennis Arriola and Janet Winnick

Benefactors - \$1,000

Steven and Araceli Alpineri
Anonymous (2)
Robert and Darcy Bingham
Marjorie and Kenneth Blanchard
Roger C. Cornell - [TO SUPPORT ARTS & CULTURE](#)
Duane and Susan Drake
Charles and Alicia Foster
Andrea and Adam Glover - [TO SUPPORT THE ENVIRONMENT](#)
Mel and Linda Katz
Luisa and Paul Larson - [IN MEMORY OF GERTRUDE JOSENDAL](#)
Mike and Meghan Pattison
James and Margaret Polak
Jack and Caroline Raymond
Barbara Bry and Neil Senturia
Dave and Phyllis Snyder
Eugene and Hannah Step
Matthew and Iris Strauss - [TO SUPPORT ARTS & CULTURE](#)
Deborah Szekely
Raymond and Linda Thomas
Paul and Neeltje Van Elderen

Sara Wilensky
Emily Young and Serge Dedina - [TO SUPPORT THE ENVIRONMENT](#)
James Ziegler - [IN HONOR OF RUDY FIERRO](#)

Patrons - \$500

Ruth and Eduardo Ambriz
Anonymous - [TO SUPPORT THE ENVIRONMENT AND HEALTH & HUMAN SERVICES](#)
Phillip and Janet Banks
Anahid Brakke
Dr. R. Jeffrey and Carol Chang
Byron Cook
Diane B. Coombs - [TO SUPPORT THE ENVIRONMENT](#)
Carrel Cremans
Ruth F. Davis
Alice and Douglas Diamond
Jeff and Heather Dugdale
Berit and Tom Durler
Mary Fletcher Harker
Douglas Hegebarth and Ellen Chang
Sheryl Helvie
Deborah and Scott Hoffman
Kenneth and Mary Hunt
David and Farideh Jaffer
Jerome and Miriam Katzin
Bob and Debi Kelly
Walt and Candi Kizer
Bob and Erin Laudner
Judith Maleki



FRIENDS OF THE FOUNDATION

A Friends of The Foundation appreciation event at Quail Botanical Gardens this year included an afternoon tea and garden tour.

Dr. Margaret and Paul Meyer
 Anthony M. Napoli
 Christina Navarro
 Jean E. Pepper — [IN MEMORY OF CLARA CRESS GREIMAN](#)
 Ellen C. Revelle
 Diane Rosenberg — [TO SUPPORT THE ENVIRONMENT](#)
 Sarah Slaughter
 Adam Smalley
 Ray and Judy Smilor
 Kent H. Swedell
 Walter and Marilyn Tom
 Heather Towne
 Dr. Stephen and Susan Weber
 John M. West — [IN MEMORY OF MARY MCPHERREN](#)
 John and Stephanie Wylie

Leaders - \$250

Drs. Miguel Alvarez and Lori Love
 Victoria Arthur Baron — [IN HONOR OF ANDY AND EINSTEIN](#)
 Sharon and Bill Beamer
 Misti Boutwell
 Jim and Mary Cowley
 Drs. Martha and Edward Dennis
 Mariano and Ruby Diaz
 Lorenzo and Isaias Duca
 Thomas and Jenny Fat
 James and Kerri Favela
 Lori and Brian Finch
 Julie Fry

Thomas R. Hall
 Judith W. Hamilton
 Walter Heiberg and Heike Kessler-Heiberg
 Zoe Herald — [TO SUPPORT THE ENVIRONMENT](#)
 Daniel and Marilyn Herde
 Gerald and Ingrid Hoffmeister
 Margaret R. Hollenbeck
 James Justus
 Anne Kilpatrick and Stephanie Van Zant
 Denise Lew, Ph.D.
 Mr. & Mrs. Marcello Mastrocola
 Amy and Michael Merrow
 Ron and Lisa Oberndorfer
 Amy Okamura
 Sharon L. Payne
 Ellen C. Revelle —
[TO SUPPORT THE ENVIRONMENT IN HONOR OF PETER B. CLARK](#)
 Frederick and Shirley Salzer
 Tom Scott
 Michael Sykes and Dr. Nora Faine-Sykes
 Michael Thometz and Theodora Davis
 Sandra Thompson
 Simona Valanciute-Kausas and Rolandas Kausas
 Adrienne and Juan Vargas
 Mr. and Mrs. Robert D. Wallace
 Amy Walling
 Wisniewski Family
 Mark and Karen Zatt

Friends - \$100

Theresa B. Acerro — [TO SUPPORT THE ENVIRONMENT](#)
 Anonymous
 Anonymous — [IN HONOR OF STEPHEN BONER](#)
 Fred Applegate
 David E. Archambault
 Judge Rafael Arreola
 Valerie Attisha
 Judith Bardwick
 Bruce and Linda Blakley
 Judie P. Bogart — [TO SUPPORT THE ENVIRONMENT](#)
 Helen & Douglas Boyden
 Nicola Bruno
 Michelle Caparas
 Dr. and Mrs. John C. Carson —
[IN MEMORY OF PAULINE DES GRANGES](#)
 Michael and Nancy Chase
 Elizabeth Corrow
 H. Patricia Don Vito
 Kim Doren
 Sara Duzik
 Thompson Fetter and Jane Trevor Fetter
 Leslie Harrington
 Joshua H. Hufziger
 Conny Jamison
 Chris and Julie Keeney
 Donald P. Lang
 Richard C. Levi
 Nancy R. Lowe

Colleen Lukoff
 Janet H. McDonough
 Liza Bonilla McGuckin
 John G. Merutka
 Anne Middleton
 Donald and Rita Morgan
 Kevin and Miriam Munnelly
 Barry I. Newman
 Nicole Nisperos
 Thomas Nunan — [IN HONOR OF THOMAS NUNAN FAMILY](#)
 Richard Oppen and Ann Poppe
 Mrs. Homer D. Peabody
 Sandra B. Phelps — [TO SUPPORT STRENGTHENING NONPROFITS](#)
[IN HONOR OF GERI DANZIG](#)
 Zachary Rabinor and Rebecca Scotti Rabinor
 Sue Racanelli
 James W. Royle, Jr.
 Sedra S. L. Shapiro — [TO SUPPORT SCIENCE & TECHNOLOGY](#)
 Lon D. Showley
 Fern M. Steiner
 Melody Stuart
 Paul and Konny Thompson
 Tricia Thorp
 Walter and Marian Turner
 Eleanore R. White
 Michael and Sarahbeth Wintringer
 Carol L. Young, Esq.

DONOR SERVICES

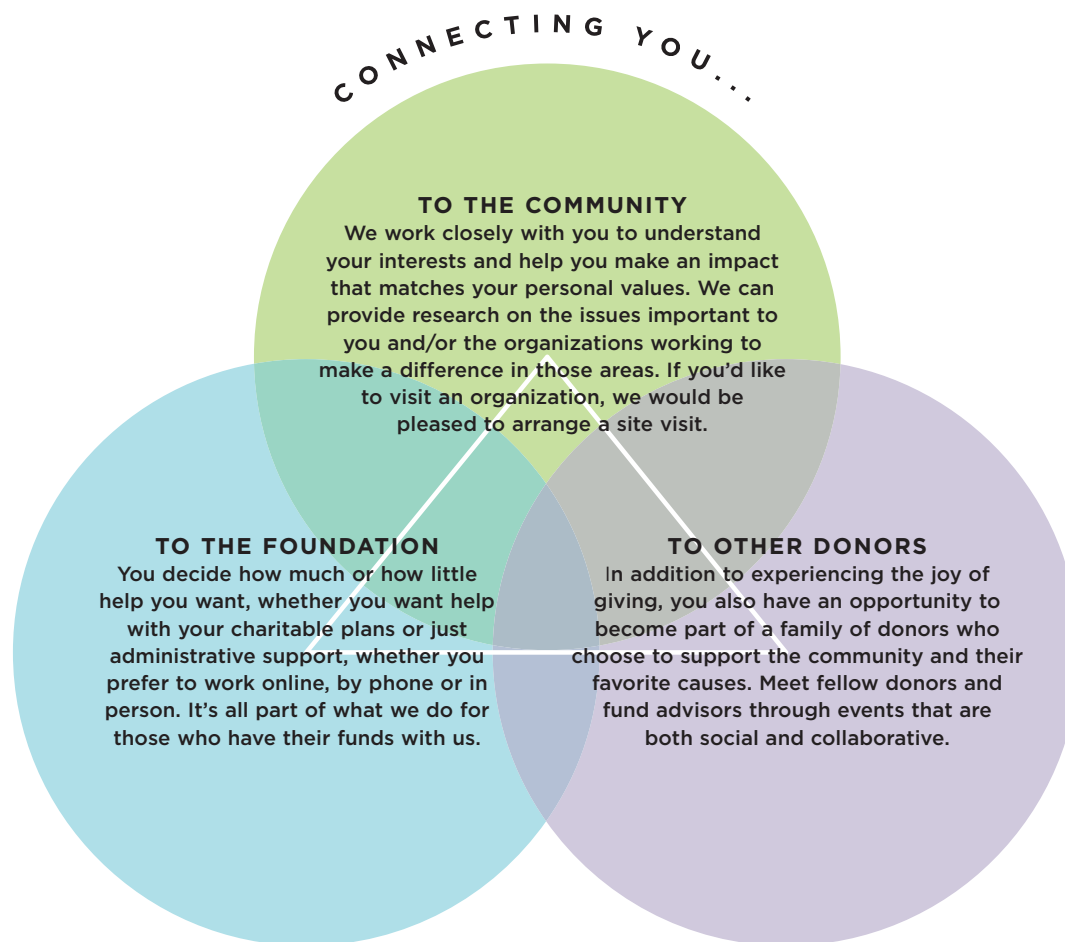
HELPING YOU MAKE A LASTING AND POSITIVE IMPACT ON OUR COMMUNITY

Many donors and fund advisors have found meaning and satisfaction through the connections they experience with The San Diego Foundation. The Fund Services Department provides links to community knowledge, affinity with other charitably-inclined people, and access to The Foundation's many services.

When I established a fund at The San Diego Foundation, I felt so relieved to both solve an estate problem and honor my parents' wish to "make the world a better place." Later, I became a volunteer on the Scholarship Selection Committee and in 2004, joined the Board of Governors. I have never seen such passion and commitment in an organization.

JANE TREVOR FETTER

CONNECTING YOU...



Past board member and donor
Mary Clark with Jane Trevor Fetter
at The Foundation's 2006 Annual Meeting.



Foundation donors at a behind-the-scenes event at the Museum of Man.

We chose The San Diego Foundation for our charitable giving because of the research on nonprofits that they provide. We looked at a commercial gift fund but decided we wanted to work with an organization that knows the community. The Foundation's research and administration has demonstrated that they have an excellent understanding of our community and the charities that support it. They make giving fun and easy.

CAROL AND HENRY F. HUNTE

Comparing The San Diego Foundation with a Private Foundation

For many donors, a fund at The San Diego Foundation is a more convenient, less expensive and simpler alternative to a private foundation. A fund at The Foundation spares donors the time demands and expenses associated with managing a

separate organization while allowing them to accomplish their charitable objectives, build a legacy in their family name, fulfill multiple charitable interests, and teach philanthropic values to the next generation.

	THE SAN DIEGO FOUNDATION	PRIVATE FOUNDATION
LENGTH OF TIME TO ESTABLISH	A fund is easy to establish and can be set up in as little as one day.	Can be time-consuming, taking more than three months. Generally requires creation of articles of incorporation, bylaws, and filing with the state and IRS. Usually requires the review of an attorney.
START-UP COSTS	No cost.	Substantial legal and accounting expenses which may range from \$2,000 to \$5,000.
OPERATING COSTS	Services are provided at a very low cost (annual fees range from 0.5% - 2.0%, depending on the fund type). Costs are lower because every fund shares in defraying total costs.	Must bear all annual administrative, investment and operating costs, including insurance, legal and accounting expenses.
TAX BENEFITS	Maximum tax benefits and no excise tax.	Smaller tax deductions and must generally pay excise tax up to 2% on net investment gains.
TAX PREPARATION	Does not apply.	Must file annual federal tax returns, disclosing investments, grants, trustee fees, salaries and other expenses.
REQUIRED PAYOUT	Does not apply.	Must distribute 5% of net asset value annually, regardless of annual income.
GRANTMAKING SUPPORT	Professional staff is available to help identify and assess grantees, offer input and research on community needs, and ensure that grant monies have been properly used by grantees.	Must arrange and support its own grantmaking and monitoring structure.
INVESTMENTS	Assets are professionally invested and benefit from reduced investment fees and risk, due to greater diversification. Each donor receives regular financial reports on the activity of the fund, noting distributions, income and investment performance.	Must research and secure its own investment vehicles.
PRIVACY	While tax returns of The San Diego Foundation are public, the records of individual funds are not, affording greater privacy in operation of a fund.	Tax returns are public information and are entered into directories for grant-seekers and available on the internet.

SETTING UP A FUND

The San Diego Foundation has helped thousands of people plan their giving, maximize their tax advantages, and support their favorite nonprofit organizations during their lifetimes and beyond. With more than 30 years of experience, we can help you give effectively through a personalized giving plan that accomplishes your goals.

IT'S AS SIMPLE AS A, B, C!

A Choose the type of fund – endowment or non-endowment.

An endowment is a permanent fund that provides support for present and future needs in perpetuity with the principal invested and the income used for grants.

A non-endowment fund distributes grants from both the principal and the interest earned on contributions. It is not permanent.

B Choose a name for your fund.

A fund may be named for you, your family, or in honor or memory of someone special in your life. You may also choose a name that will enable you to carry out your charitable wishes anonymously. Every grant from the fund will carry this name.

C Identify the purpose of the fund – benefiting the common good, a specific interest, a particular organization, etc.

Common Good Funds are a good option for donors who want to be assured that their gift will always be used to meet vital community needs and improve the quality of life in the San Diego region. Grants are distributed in the name of your fund through The Foundation's Community Impact Grants Program (see page 42).

Field of Interest Funds – a type of Common Good Fund – allow donors to identify a specific issue or geographical area to be supported, without specifying individual charities. On your behalf, The Foundation will award grants to organizations that are making a difference in that area. (See page 11.)

Designated Funds are for donors who want to support specific nonprofit organizations but recognize that the world may change. A designated fund ensures that your gift remains relevant over time and responsive to changing circumstances.

Scholarships are used to aid students pursuing academic goals. Foundation staff members are available to assist you in determining criteria for awards and in the recipient selection process.

Advised Funds are funds in which the donor (or his/her designee) retains the right to “advise” or recommend to the Board of Governors specific grant distributions to qualified nonprofit organizations.

WAYS TO GIVE

Outright Gift

Make an outright gift. The following gifts qualify for an immediate tax deduction.

- Cash
- Real estate
- Publicly traded securities
- Stock options or founder's stock
- Qualified retirement plan or IRA assets
- Life insurance
- Tangible personal property
- Assets of other trusts or of a private foundation
- LLP/LLC shares

Bequest

Specify a gift in your will or revocable trust. All gifts to The San Diego Foundation are excluded from estate taxation. Even though your gift is not distributed until after your lifetime, you will be honored and recognized now as a member of our Legacy League (see page 25).

Life Income Gifts

Making a gift to a Charitable Gift Annuity or Charitable Remainder Trust provides you with a guaranteed income for the life of one or two individuals, and a portion of the income may be tax-free. These gifts also create an immediate charitable deduction.

Charitable Lead Trust

Transferring assets to family members is subject to gift and estate taxes, perhaps as much as 55%. Through a Charitable Lead Trust you can reduce or even eliminate those taxes.

Retained Life Estate

A significant part of most Californians' estate is their home. You can transfer ownership of your home to The San Diego Foundation, continue to enjoy all the benefits of staying in your present surroundings for your lifetime, and receive immediate tax benefits.

INFORMATION FOR PROFESSIONAL ADVISORS

Partnering with The San Diego Foundation

Completing a charitable plan that meets the needs of each client can be challenging. Your clients look to you for answers. When you engage The San Diego Foundation as a resource, we can help you work through the myriad of gift options and resulting tax implications.

We can provide you with technical assistance to help your clients maximize the personal benefits of giving when they are making decisions in connection with the following: 1) estate planning; 2) retirement planning; 3) sale of a business or other major assets; and 4) adjusting to a financial windfall.

Professional Advisor Resource Center

Visit our website for quick and comprehensive answers to charitable giving questions. Product sheets, common client scenarios and gift illustrations, sample fund agreements, and many other tools are available in the Professional Advisor Resource Center at www.sdfoundation.org.



"If a client is thinking about charitable giving and has more than one organization in mind, The Foundation is ideal – easy to work with, efficient and no pressure."

– CHARLES E. FOSTER, II
Financial Planner, Blankinship & Foster
Chair, The San Diego Foundation's
Professional Advisor Council

NEW FUNDS

The San Diego Foundation manages more than 1,200 separate funds on behalf of our donors – individuals, families, businesses and nonprofit organizations – who have partnered with The Foundation to fulfill their charitable and financial goals. We are pleased to introduce the new funds established during the period from July 1, 2005, through June 30, 2006.

NEW ENDOWMENT FUNDS

GIFTS THAT LAST FOREVER

The following donors have chosen to endow their passions by establishing endowment funds to provide endless support to charitable causes they hold dear. These funds are a permanent source of community capital, helping The Foundation do good work today and far into the future.

Anonymous

Elfin Forest Fire Department Facilities Endowment Fund

In 1972, the residents of the Elfin Forest community formed a volunteer fire brigade called the Elfin Forest Volunteer Fire Company. In 1982, the volunteer group was reorganized and became a nonprofit called Elfin Forest/Harmony Grove Fire Department with the mission to ensure a progressive, well-trained and well-equipped fire department capable of providing excellent service to the communities it serves. The fire department is a direct reflection of the community's motto, "Neighbor Helping Neighbor."

This fund was established by two anonymous donors to show appreciation and support for the fire department. The fund provides firefighter quarters and facilities maintenance to improve service and reduce response times to its communities and surrounding cities.



"neighbor helping neighbor"

ELFIN FOREST VOLUNTEER FIRE DEPARTMENT

William and Lucille Ash

William and Lucille Ash Scholarship Fund

The purpose of this fund is to provide financial assistance to adult re-entry college students.

Frank H. Ault

Frank H. Ault Scholarship Fund

Frank Ault understands the importance of education and its impact on a community. Raised in Altadena and Palm Desert, CA, he attended Stanford University and graduated with honors. After serving in the U.S. Army as an officer, he moved to San Diego and took a job with San Diego Gas & Electric where he worked his way up the corporate ladder. Frank retired in June 2006 as Senior Vice President & Controller of Sempra Energy.

Frank is passionate about volunteering and has always found time to help make our community a better place. "I believe in giving back and assisting others," says Frank. He became a volunteer firefighter in 1961 and is still an active volunteer, as chair of the San Diego Regional Fire and Emergency Services Foundation and board member and volunteer firefighter with the Mount Laguna Volunteer Fire Department. Frank also served on The San Diego Foundation's Board of Governors for 16 years and rose to become its chair.

The Frank H. Ault Scholarship was established with generous contributions from Sempra Energy, Frank, and Frank's colleagues at Sempra.

Albert Blaylock

The Blaylock Family Fund

Albert Blaylock started thinking about his family legacy when his son Clayton passed away in 1988 and again when Mrs. Blaylock passed away in 2004. While finalizing his estate plan, Albert decided it was time to not only include The San Diego Foundation in his plans, but to immediately start an active endowment fund.

Son Brandon and his young family are involved in current grantmaking decisions, as well as stewarding the family legacy for generations to come. With his long-standing involvement in local charity, Brandon is excited to take the family's philanthropy to the next level.

"The community knowledge of The Foundation will be an excellent resource as we make charitable giving one of our family traditions," says Brandon. Supporting education and health services is important to the Blaylocks, as close family members have battled Alzheimer's, Guillain-Barre Syndrome and breast cancer.

California Shore & Beach Preservation Association

Robert L. Wiegel Scholarship Fund for Coastal Studies

The Robert L. Wiegel Scholarship Fund for Coastal Studies was established in honor of Robert L. Wiegel, Professor Emeritus at the University of California, Berkeley, for his leadership and accomplishments in the fields of coastal and oceanographical engineering. The fund will provide an annual scholarship for graduate study at a university in the State of California in a discipline related to coastal engineering or coastal science.

Members of the deAnza Country Club

deAnza Country Club, Ilene Mays Memorial Scholarship Fund

Members of the deAnza Country Club who wanted to create a special memorial to Ilene Mays, a longtime and beloved employee, established this fund to provide scholarships for deAnza Country Club employees and their families.

John Duca and Malee Tobias

The Lorenzo and Isaías Learn to Share Fund

John and Malee established this fund as a vehicle for the family's philanthropic giving and also a way to instill in their children, Lorenzo and Isaías, the value of sharing.

Gateway Vista De Oro, LLC

Las Brisas Habitat Management Fund

The purpose of this fund is to support the long-term habitat maintenance and monitoring of the open space on the Gateway Las Brisas project located in San Marcos, CA.

Dr. David and Barbara Groce

Edith Hazel Ondrasik Girl Scout Campership Endowment

Edith Ondrasik dedicated her entire life to children, both her own and the



Common Good Funds

(designated by the symbol above) offer the broadest giving option, allowing The San Diego Foundation to meet the critical needs of the community as they arise.

Donors may select a particular field of interest for their Common Good Fund, such as environmental preservation, supporting the arts or caring for homeless children.

The San Diego Foundation will ensure that your intentions are honored and fulfilled forever.



Photo by Pam Hayhurst

EGRET AT ROSE CREEK CANYON.
Photo courtesy of Sierra Club – San Diego
Chapter. 2006 Environmental Grantee.

elementary students she worked with at St. John's and Inglewood Schools. She was also heavily involved in operation and leadership in both the Girl and Boy Scout programs. The Edith Hazel Ondrasik Girl Scout Campership Endowment was established in her honor. This fund enables deserving Girl Scouts in the San Diego-Imperial Council to share a camping experience with their fellow scouts.

Liz Keadle

Elizabeth Keadle Endowment Fund

After initially exploring the possibility of establishing a private foundation, Liz Keadle opted instead to establish two funds at The San Diego Foundation. The first, an endowment, is a designated fund, which will support the research of Dr. Wylie Vale at the Peptide Biology Laboratory of the Salk Institute. The second is a non-endowment fund that will support various organizations, including those in the fields of science, environment and supportive services for seniors.

The Orca Fund of The San Diego Foundation

Environment Fund

The San Diego Foundation's Environment Fund was established with a \$1 million gift from The Foundation's Orca Fund. This gift was to provide seed funding for the endowment, with the intent of building a \$25 million fund over time. The endowment fund will ensure that The Foundation will always be able to support the environmental organizations working to protect our air, land, water and other resources to preserve our region's natural diversity and quality of life for present and future generations.



Sandra Perlatti

Matthew G. L. Perlatti Memorial Fund

Matthew Perlatti lost his life to drugs in April 2006, at the age of 22. His profound strength and legacy was his concern and caring for the well-being of all people regardless of age, culture or background. He was particularly interested in being an advocate for the disadvantaged or those in need of help without visible means of support.

Through this memorial fund in his honor, Matthew's friends and family have the mission of assisting the disadvantaged and those in need of help by giving them support and resources to make their lives better.

QUALCOMM, Inc.

San Diego Science, Technology, Engineering and Math Endowed Scholarship Fund

The purpose of this fund is to provide financial assistance to local students majoring in math, science, engineering or technology, and attending either the University of California, San Diego; San Diego State University; or California State University, San Marcos.

Arthur and Sandra Rowsell

Nice Guys Inc. of San Diego Endowment Fund

Family is the main focus of the Nice Guys of San Diego. The money they raise is used to help families that have somehow "fallen through the cracks" to get back on their feet and become self-sufficient. The Nice Guys have a strong tradition of community service. They take this responsibility to heart and are richly rewarded by the knowledge that they make a difference in people's lives by offering a hand up.

Art and Sandy Rowsell established this fund to support and participate in the Nice Guys' Christmas Holiday Festival. They got involved some years ago by sponsoring stockings with toys and books for the many children who attend this event each year. The Rowsells hope that by adding the proceeds of this endowment fund to what they give each year, children in need will always be supplied with toys and books, even long after they are gone.

San Diego Coastkeeper

San Diego Coastkeeper Endowment Fund

The purpose of this fund is to provide grants to protect San Diego County's bays, beaches, watersheds and ocean for the people and wildlife that depend on them through the San Diego Coastkeeper.

The San Diego Foundation's Arts & Culture Working Group

The Arts & Culture Endowment Fund

The Arts & Culture Endowment Fund was created to provide support in perpetuity for the vibrant arts and culture community in the San Diego region.

This year, as part of The San Diego Foundation's "Understanding the San Diego Region" initiative, the Arts & Culture Working Group released the results of a comprehensive study of cultural participation in the San Diego region. Overall, the findings underline the need to increase "cultural patronage," defined as cultural participation at all levels. This means increasing knowledge about the region's cultural assets, actively accessing those assets and offering support to make them better. The San Diego Foundation envisions a community where every resident shares a stake in the success of our arts and culture sector.

Based on the case for increased patronage put forward by this research, The Foundation has established this endowment fund and is currently developing an action plan, in collaboration with the wider community, to form a multi-faceted, coordinated approach to increasing the number of people who participate in cultural activities in our region.

Sedra Shapiro

Shapiro Family Fund

The purpose of this fund is to support science education, arts and environmental causes.

Dr. Charles and Judith Wheatley

Wheatley Family Foundation Fund

This fund was created by merging the assets of the private Wheatley Foundation into an advised endowment fund at The San Diego Foundation. The founders of the fund, Dr. Charles and Judith Wheatley, intend to continue to meet the mission of the Wheatley Foundation by recommending grants that improve southern Californians' quality of life by supporting programs that educate and build confidence and self-esteem of children and victims of domestic violence, and by supporting animal and environmental programs.



Some of the organizations the Wheatleys have supported in the past include Spencer Valley School in Wynola for academic enrichment and their production of Shakespeare's "As You Like It"; UC Davis Wildlife Health Center to assist in the development of a website to provide information about cougars to the public; and Aquatic Adventures to purchase a color laser printer and five thumb drives for computer information sharing.

Christy Hawes Zatkin

Ernest & Gratia Hawes Designated Endowment Fund

This fund was opened by Christy Hawes Zatkin to be a source of hope and hospitality to people who have lost everything, including family members, before coming to the United States. This fund is designated to benefit the Nile Sisters Development Initiative.

Started by Elizabeth Lou, a refugee from Sudan, the Nile Sisters Development Initiative helps refugees, particularly women, learn how to live in this country. The Initiative always has needs beyond its budget, such as diapers, clothes for school, bus tokens and summer camps. This fund will provide support for these needs today and far into the future.

Christy and her husband, Howard, feel strongly about community involvement and support. Caring about the community is a family tradition passed on to Christy by her parents and grandparents and one that Christy and Howard will pass onto their son and daughter.



English Tutorial, Nile Sisters
Development Initiative

heather

Donating a rental property to The San Diego Foundation not only increased my monthly income, but it has allowed me to support two of my passions, global humanitarian efforts and music education.

HEATHER CHISHOLM-CHAIT



NEW LEGACY FUNDS

ESTABLISH YOUR LEGACY WITH A PERMANENT CHARITABLE FUND AT THE SAN DIEGO FOUNDATION

Many donors take advantage of the opportunity to make deferred gifts to The San Diego Foundation through a broad range of planned giving vehicles. By establishing a Legacy Fund, donors support the causes and community they love now and create a lasting legacy of care and giving for the future of the San Diego region.

Anonymous

Frankie's Fund

Frankie's Fund was established to make this world a kinder place for animals, in San Diego and around the world, and will support organizations that work hard to promote ethical behavior by humans toward animals, animal protection and animal welfare goals. The founders strongly believe that compassion and concern for vulnerable, abused or mistreated beings—human or otherwise—are the moral obligations of every society.

Unlike most humans, animals are not afforded an adequate measure of societal protection and are often seriously affected by untamed and uncontrolled human actions. The founders believe that encouraging compassionate and moral behavior in the treatment of animals can lead humankind to a sustainable, long-term relationship with the environment and with each other. Mahatma Gandhi used words that best illustrate their belief: "The moral progress of a nation can be measured in the way in which it treats its animals."



Heather Chisholm-Chait

Heather Chisholm-Chait Fund

Heather Chisholm-Chait moved to San Diego in 1980 after more than 20 years in New York where she raised her two children. Born and raised in Montreal, Canada, she feels that perhaps it is this influence that feeds her communitarian instincts. Heather feels strongly that those who have resources carry an enormous responsibility to help others on this injured, endangered planet that we share.

After working with The Foundation to donate a rental property, Heather established a charitable gift annuity which increased her monthly income stream. Pleased with her experience, she then established this legacy fund to benefit several international and local organizations.

In December 2005, Heather and her son also established a scholarship fund to address the serious need for music education in San Diego.

Roger C. Cornell, M.D.

Roger C. Cornell Legacy Endowment Fund

Roger Cornell, M.D., a senior consultant at Scripps Clinic, has a keen interest in art. Some time ago, he established an endowment fund to support The San Diego Foundation's Arts & Culture Working Group, of which he currently serves as Chair. This past year, he also created this legacy fund to support arts and culture in the San Diego region. Among many community activities, Dr. Cornell served an eight-year term on the Commission for Arts and Culture.



Kim Doren

Kim Doren Endowment Fund

Kim feels she has been extremely blessed throughout her life with a loving family, a wonderful Stanford education, good health, and tremendous career and travel opportunities. As a result, she passionately believes in trying to make the world a better place for others less fortunate. Kim also credits her mom and dad for teaching her the importance of volunteerism and philanthropy. She feels that giving is truly a joy.

Because Kim doesn't have children of her own, creating a fund enables her to leave a legacy to future generations. She selected The San Diego Foundation for the fund because, despite pressing global needs, she felt she could make a more meaningful impact by focusing on her local community.

Kim wanted to establish a fund for the common good of San Diego for a few reasons. First, she has a multitude of interests. Second, she knows that many worthwhile nonprofits and causes don't receive much exposure, yet are very deserving. Third, her life has been filled with surprises and serendipitous adventures, so she is well aware that we cannot always adequately anticipate the future. Random events and unforeseen circumstances will create needs that require funding in the years to come, and Kim's fund will be there to help.

David Jackson

Dave Jackson Fund

Dave Jackson is a native of San Diego and has lived in the Point Loma area for over 20 years. He established this legacy fund in August of 2005 so that his children Doug, Lauren and T.J. will continue the family tradition of being involved in the community. Dave's late wife, Nikki St. Germain, inspired Dave to not only get involved in the community but also to set up a fund to carry out his legacy of supporting children's charities in San Diego. Dave serves on the board of Voices for Children and is involved with Children's Hospital.



L. Bruce Brown and Jan LaCombe

Jan LaCombe and L. Bruce Brown Fund

The purpose of this fund is to provide support to KPBS, non-euthanizing animal care centers, and organizations that provide training for animal companions, community dental care and transportation for the elderly.

Jerry and Patti Link

Richard G. and Patsy C. Link Family Fund

Jerry and Patti Link believe that everybody deserves a home and want to help those families who are homeless obtain that goal. The Links set up a legacy endowment to address the issue of homeless families in the San Diego region. Patti was born in Illinois and Jerry in Pennsylvania. Over time, both ended up in Phoenix, Arizona, where they married 39 years ago. Jerry retired from Merrill Lynch after 35 years of service, and he and Patti now live in downtown San Diego. Growing up, both were raised with the philosophy of supporting the community in which you live. They see charitable giving as a way to say thank you to your community for providing opportunity and prosperity. Some of the organizations they currently support include Father Joe's Villages, Salvation Army, The Children's Museum, and Monarch School.



Kim

Kim wanted to establish a fund for the common good of San Diego for a few reasons. She has a multitude of interests, she knows that many worthwhile nonprofits and causes don't receive much exposure, and she is well aware that we cannot always adequately anticipate the future.

KIM DOREN

JAN LACOMBE AND
L. BRUCE BROWN FUND
Provides support to KPBS, non-euthanizing animal care centers, and organizations that provide training for animal companions, community dental care and transportation for the elderly.

A FOUNDATION FOR YOUR PASSION

Mark D. Leff**MDL Fund**

The purpose of this fund is to support the Back Country Land Trust, a land conservancy dedicated to preserving and enhancing the natural, scenic and cultural areas, working farmland and watersheds that make San Diego's back country thrive.

Jim and Linda Nordstrom**Jim and Linda Nordstrom Family Fund**

Jim and Linda Nordstrom established their fund in the spirit of giving back to the community. During their time together, they have always supported the causes that touched their lives. While growing up in the beauty industry, Jim and Linda had the opportunity to help people feel better about themselves through the power of professional salon products. Selected as 1998 City of Hope honorees, they supported advanced research in the area of breast cancer by raising over \$750,000 from an industry that is predominantly female. Having lived in the San Diego area since the early 1970's (Jim) and early 1990's (Linda), they understand how special the community is today and they want to ensure it continues to be that way for their children, Niki & Carli, well into the future. Their charitable focus includes the UCP San Diego Chapter, Brother Bennos in Oceanside, the City of Hope in Pasadena and, in general, improving our great community.

Carl and Beth Petersen**Carl and Beth Petersen Family Fund**

The purpose of this fund is to support programs and services for individuals with disabilities and programs and services preserving the environment.

**Jack and Caroline Raymond****Raymond Family Legacy Endowment**

The purpose of this endowment fund is to support general charitable purposes.



The MDL FUND will support the Back Country Land Trust.

**Jack and Caroline Raymond****Raymond Family Legacy Fund**

The purpose of this fund is to make significant naming grants to Cal State San Marcos, Elizabeth Hospice, North County Interfaith Council, North County Health Services, Escondido Education Foundation, Cornell University, Escondido Library Foundation and Escondido Cares - A Community Foundation.

LEAVING YOUR LEGACY

The Legacy League of The San Diego Foundation is a group of caring people who plan to leave an indelible mark on their community through a gift at the end of their lifetimes. The Legacy League was created to recognize those individuals who have chosen The San Diego Foundation to provide long-term stewardship of their charitable wishes. Donors may create a lasting legacy through a will, living trust, charitable remainder trust, pooled income fund, charitable gift annuity, insurance policy or qualified retirement plan. If you have included The Foundation in your estate, please let us know so that we may honor you, too. Legacy League members are as follows:

Hattie Ettinger's legacy helps preserve and protect nature's gifts.



Julie Allen
Leonard B. Allen
Jane Anderson
Lyn M. Angene
Alfred Antonicelli
Nikki St. Germain Arthur*
Jo Anne Badeau
Darrell Bailey and Mimi Pollard
Kenneth and Ginger Baldwin
Mayme Barnes
Leon G. Baron*
John and Loo Ann Barrett*
Patricia Barrett
Charles Bates
Helen Grayson Beebe*
Clarissa Beerbower*
Silvia Berrios
Leslie Blain*
Mary Ann Blair
Beverly Boggs
Clarence and Barbara Borns
Tom and Doris Boruszewski
Mike Bosworth
Eugene* and Barbara Bowman
Philip and Elizabeth Boyer*
Edwin and Nancy Lee Bradley
Robert Bradley
Martin Breslauer
Richard Lyle Jones
and Alan Brimble
Daniel and Althea Brimm
Louise A. Broderick*
Everett and Rosemarie Brown

Frank and Marilyn Brown
Barbara Bry
Ruth E. Burkhardt
Esther Burnham
Malin and Roberta Burnham
Drs. David and Sharon* Burt
Leonard Busch
Richard Forhan Cahill
Patricia R. Cammett
Leon and Mary Lou Campbell
Ruth C. Campbell*
Kenneth and Deni Carpenter
Donald and Margaret Carroll
Evelyn Carter
Heather Chisholm-Chait
Col. Robert A. Churley, USMC Ret.
Don and Lynn Cihak
J. Dallas* and Mary Clark
Lois Clausen
Larry W. Cohen
and Eleanor Coberly Cohen
Dr. Clifford
and Carolyn Beall Colwell
Bruce Coons
Mildred Cooper*
Dr. Roger C. Cornell
Carlton Crain*
Charles B. Cram*
Loch and Clare Crane
Anna M. Curren
Matt and Frances Dalton
Mark and Lorine DeHuff
Michael and Janet Delaney

Sam Blasker's legacy supports emerging scientists and innovative scientific discoveries (see pages 49 and 53 for the 2006 Blasker Grant Awards).



The Bertelsen's legacy is a scholarship fund that has helped more than 30 students attend college.

John and Joyce Del-Zio
 Dr. William and Patrizia Diamond
 Jim Dickinson
 Donald Dierks
 Harold and Penny Dokmo
 Kim Doren
 The Dreisbach Family
 Eloise Duff
 Jack and Dorothy Dumas
 Eleanor Taylor Duncan
 Ben and Kate Echeverria
 Paul Ecke, Jr.*
 William and Ruth Eisenmann*
 George P. Ewens
 Mark and Kathleen Fackler
 Danah H. Fayman
 Willis and Jane Fletcher*
 Henry and Doris Florentine*
 Eugene and Joan Foster
 Dr. Peter and Carol Frank
 Thomas C. Frank
 William H. and Judith M. Garrett
 Al and Donna Gebhart
 Frank and Leslie Germano
 William Goodridge
 William Gottsdanker
 Betty Buffum Gouraud
 Capt. and Mrs. Ralph B. Grahl
 Granowitz-Lees Family Trust
 Ralph Green
 Allen and Ruth* Grimwood
 Dr. David E.
 and Barbara Ann Groce
 John and Mindy Gurrera
 Edward and Genevieve Haddon*
 Edith R. Hakes
 Jerry and Jill Hall
 Ferne Hare

Mrs. Jerome J. Hargarten
 Mary F. Harrison
 Albert T. Harutunian, III
 Kathryn Crippen Hattox
 Nancy E. Hawkins
 Dr. and Mrs. Robert Heighton
 Gerald T. Heintzberger
 Joseph and Melva Heinzl
 Doris L. Hendren*
 C. Jack and JoAnne Hendrickson
 Barbara D. Hendrix
 Dan and Roberta Henry*
 Wallace and Barbara* Henshaw
 Gerald and Jane Heveron
 Ingrid and Joseph* Hibben
 Anne Hoffman
 Lois L. Honeywell*
 Mrs. Quinn Hornaday
 Marjorie Howard-Jones
 Beatrice Hutchinson
 David and Betsy Imper
 David Jackson
 Harold and Madeline Jacobs
 Dr. John Johnson
 William and Christina Johnson
 Joel Estrada Joves
 Paulette Kahn
 Bob and Debi Kelly
 R. J. and Lora Kelly
 Philip M. and Detty June* Klauber
 Louis and Donna Long Knierim
 IK Trust
 Robert and Louise Krume
 Burton* and Catherine Kuck
 Paul and Luisa Larson
 Henry and Jindra Lasch
 Norman A.
 and Margaret C. Lassey

James H. Lauer, Jr.
 Doris Leary
 Mark D. Leff
 Donald and Charlotte Leiffer*
 Joan L. Lieffers*
 Rodger and Mary Lindsay
 Jerry and Patti Link
 Allan and E. Frances Lolly
 Barbara Loomis
 Robin Low
 Elizabeth Lowen*
 Martha Lydon
 Philip and Kay Lyles
 Ray and H. Marilyn Lyttle
 Graham MacHutchin
 Brian Colman Malk
 Don E. Malone
 Deva Martin
 John and Lois Martin
 George and Margaret McDaniel
 Edward McEvoy
 Matthew and Jean* McLaughlin
 Grace Mecklem
 Samuel Merkwowitz
 John and Herberta Miles
 Dr. Maurice and Mrs. Ree Miller
 John T. Mills
 Timothy S. and Debra L. Mills
 David L. Mitchell
 and Judith L. Bradley
 Randall and Carolyn Mitchell
 Mary Moore
 Don and Rita Morgan
 Helen Moriarty
 Robert E. and Norma J. Morris
 Kevin and Miriam Munnelly
 Thomas Murphy
 Isabelle Murphy-Dineen

Gerald Murrie*
 Alice Neace*
 Helen Nelson
 Stephanie Neves
 Jack and Jayne Newlove
 Jim and Linda Nordstrom
 Mary Elizabeth
 and Mary Gaylord North
 Reuel Olin and Robert Grinchuk
 Mr. and Mrs. Thomas T. Oyler
 George and Crystal Palmer*
 Joan Parker
 John and Weslie* Parker
 Sidney and Beatrice Parnes
 Ann Parade
 Smith and Phyllis* Penick
 Carl and Beth Petersen
 Milo R. and Jeanette H. Peterson
 John Pickard
 Teresa Plumer
 B. James and Peggy Polak
 David* and Kathleen Porter
 Oliver Porter*
 Christopher and Charlene Pryor
 William Purves
 Andy and Tina Rathbone
 Jack and Caroline Raymond
 Kenneth Rearwin*
 Carol A. Redding
 John and Ruth Reed
 Dorothy Bieber Reich
 Jeanette Reynolds
 Lucinda Ribant
 Rumi Rice
 Mr. and Mrs. Thomas B. Robertson*
 Lilly Rosengren
 Martha Roth
 Leo and Amparo Rotter

Mr. and Mrs. Arthur P. Rowsell
 Cecil Royce
 James W. Royle, Jr.
 Stuart Rubaloff
 N. Rubinstein
 Lloyd and Ilse Ruocco*
 Henry Saleebey*
 James Sands
 Lou Sangiolo
 Eugene W. and Anne E. Schmitt*
 Frances M. Schultz
 Marsha Kay Seff
 Lester J. and Jane Selck*
 Morton* and Florence Semelmaker
 Wayne and Cheryl Seppala
 Jocelyn G. Shannon
 F. Walter and Marlene Shaw
 Jim and Norma Shiner
 Arthur Shipman*
 Elie A. and Polly H. Shneour
 George and Helen Silvani
 John and Jessie Simmonds*
 June Singer
 Elizabeth Smallfelt
 Nina Smart
 Betty Smith
 Ron and Cheryl Smith
 William and Marilyn Smith
 David Spainhower
 Donald and Peg Spanninga
 Dwight E. Stanford
 Kathryn Stark
 Robin Stark
 Thelma Starkey*
 Col. Oscar and Evelyne Steinberg*
 Joan Marie Stevens
 John and Marilyn Stickney
 Marlo L. Stil

Edward R. Stokes
 Carl and Masako Streling
 Mark Hayes Stuart
 James* and Carol Sugg
 Edward and Ethel Sweed
 Judith Swink
 David and Lynn Tagge
 Marie Taylor
 Vernon and Mary Taylor
 William and Carolyn Taylor
 Muriel Timossi
 Walter and Marilyn Tom
 Dr. William and Ruth Treat
 Gene and Celeste Trepte
 Don and Marie Van Ness*
 Barbara Walbridge
 Donald and Alta Waller
 Helen Walton
 Phil and Rusty Ward
 Carolyn Wardell
 Linda Webster
 John B. Weil
 Susan Fleet Welsh
 Antoinette H. West*
 Frances White
 Knox and June Williams
 Zae Winter and Ruth Rollins
 Richard and Martha Witz
 John and Shirley Worobec
 Jean Wright-Elson
 Theo and Evelyn Yakel
 Phyllis C.* and William E. Zamboni
 James Ziegler
 Melba Zihrup*

* Deceased

Eugene Schmitt's legacy
 assists people who suffer
 from leukemia, heart
 disease or Alzheimer's.



Wig and Jane Fletcher's legacy is a
 family tradition of charitable giving that
 they passed on to their next generation.

NEW NON-ENDOWMENT FUNDS



THE ATHENA SCHOLARSHIP FUND
This fund provides scholarships to graduating high school women who will attend a four-year university and plan a career in the sciences, math, engineering or computer science.

Tom Adler

Adler Foundation Fund

Tom Adler immigrated to the United States from Vienna in 1938, six months after Hitler marched in. Tom and his parents and sister were some of the last to escape, and most of his relatives were killed during the Holocaust. Because of his background, Tom feels it is important to give back to his community and is grateful for what this country has done for him. Tom became a civil rights litigator and was also a mediator for the Superior Court. Now retired, he spends most of his time writing and tending to the Adler Foundation, which is housed at The San Diego Foundation.

Tom established this fund with the vision to make the world a better, more peaceful place to live by encouraging: 1) a more informed and aware general public by supporting whistleblowers, journalists and others who work to uncover and publicize government or corporate agencies engaged in unethical practices; and 2) the nourishment of the arts by awarding scholarships to high school students through the Guido Adler Jazz Piano Scholarship Competition.

Amylin Pharmaceuticals Inc

Amylin Pharmaceuticals, Inc. Foundation

Amylin Pharmaceuticals is a biopharmaceutical company committed to improving lives through the discovery, development and commercialization of innovative medicines. Headquartered in San Diego, the company was founded in 1987 on the discovery of a hormone, amylin, produced by the same beta cells of the pancreas that make insulin. Since then, Amylin has built a strong foundation on research and development. Amylin's scientists are primarily focused on investigating the potential utility of new peptide hormone candidates. The company

has amassed significant research and clinical expertise in metabolic medicine including the areas of diabetes, obesity and cardiovascular disease.

Amylin established this fund as a mechanism to match contributions made by its employees to organizations they choose to support. Amylin is exploring expanding its granting programs based on the company values of diabetes and obesity awareness, science education and healthy lifestyle programs.

Anonymous

La Cresta Horse Rescue Fund

This fund was established to support La Cresta Horse Rescue at Wind Dance Ranch in Murietta. The horse rescue and refuge program is an affiliate of the Escondido Humane Society.

Athena

Athena Scholarship Fund

The Athena Scholarship Fund provides scholarships to graduating high school women who will attend a four-year university and plan a career in the sciences, math, engineering or computer science. This scholarship program is in alignment with Athena's mission: promoting the advancement of women in leadership roles within the technology, bioscience and healthcare sectors, thereby enhancing competitiveness and opportunity in the San Diego business community.

James F. Beyster

J.F. Beyster Fund

James Beyster established this fund to support local charities involved in educational outreach to children in grades K-12, providing resources for mental health consumers and their relatives, and protecting the biodiversity of San Diego

County. James received the inspiration to establish this fund from his family who has operated a charitable foundation for several years.

James works as a mechanical engineer at SAIC. In his spare time, he enjoys cycling and scuba diving. He also loves adventure travel that requires moderate hiking, cycling or scuba, and underwater photography. James currently volunteers his time and effort to support the San Diego Underwater Photographic Society, the San Diego Council of Divers, and the Scripps Oceanographic Collections.

Mary Ann Beyster

M.A. Beyster Fund

San Diego is the place Mary Ann Beyster calls home. Although Mary Ann has lived many places in her life, she was born here, lived here through high school and now has returned. San Diego is the community she cares most about and the one she wants to make sure is the best it can be. She believes that nonprofit and civil society organizations play a critical role in making society better—locally and globally.

Mary Ann grew up in a family that has and continues to support many nonprofit organizations. She actively participates in her family's charitable giving, but this past year she felt it was time to focus on her own charitable interests. To that end, Mary Ann established the M.A. Beyster Fund. This fund will support organizations that are committed to seeking a balance between improving the environment, the quality of life, and economic progress. She understands this is a tough balance to achieve, but believes that we are only limited by our own imagination and aspirations. Mary Ann believes her fund is a modest way of trying to make San Diego and the world a better place to live.

William and Cheryl Bramley

Bramley Family Fund

Bill and Cheryl Bramley established this fund to support general charitable purposes.

Gordon Brodfuehrer

Brodfuehrer Family Balboa Park Preservation Fund

Gordon Brodfuehrer called The San Diego Foundation seeking a way to honor the memory of his parents. Alma and Joseph Brodfuehrer met in San Diego and decided to make this community their home. Having married during the Depression, the young family's entertainment choices were limited. That is, until they discovered Balboa Park. Enchanted by its beauty, the Brodfuehrers visited Balboa Park every weekend.

Many years later, Gordon lives on the edge of the park. Strolling down the familiar paths, he takes note of the many places in need of repair, restoration and care. "My parents were very generous to me. I am fortunate to have resources and be able to help keep our park beautiful."

Eric and Jennifer Busboom

Busboom Family Fund

Eric and Jenni Busboom discovered The San Diego Foundation through Eric's involvement with the Sierra Club. As parents, the Busbooms plan to be active philanthropists for a long time and to include their son, Max, in the family's charitable decisions. To honor Jenni's mother, a life-long literacy advocate, the Busbooms will support local literacy programs. Since both Eric and Jenni are engineers, their passion for science will continue through volunteering and financial support of community science enrichment organizations and their colleges.

Heather Chisholm-Chait

Chisholm-Chait Scholarship Fund

Heather Chisholm-Chait moved to San Diego in 1980, after more than 20 years in New York where she raised her two children. Born and raised in Montreal, Canada, she feels that perhaps it is this influence that feeds her communitarian instincts. Heather feels strongly that those who have resources carry an enormous responsibility to help others on this injured, endangered planet that we share.

"My parents were very generous to me. I am fortunate to have resources and be able to help keep our park beautiful."

GORDON BRODFUEHRER
Brodfuehrer Family Balboa Park
Preservation Fund



A FOUNDATION FOR YOUR PASSION

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David
and Leslie

The Cohns have chosen to dedicate funds to a place of beauty that will be enjoyed for generations to come.

DAVID AND LESLEY COHN

Pleased with her experience of working with The Foundation to donate real estate and establish a charitable gift annuity, Heather then established a legacy fund to benefit several international and local organizations (see page 22).

In December 2005, Heather and her son also established this scholarship fund to address the serious need for music education in San Diego. To that end, she is currently working with Villa Musica, San Diego's new center for community music education, which enables people of all ages and backgrounds to discover, explore and enhance their music skills as part of a community of musicians and lovers of music.

The Club at Morningside

The Club at Morningside Employee Scholarship Fund

This scholarship was established by members of The Club at Morningside in Rancho Mirage, CA, who wanted to make a difference in the lives of the club's employees and their families. This fund will provide scholarships for employees of The Club at Morningside and their children.

David and Lesley Cohn

David and Lesley Cohn Family Fund

David and Lesley Cohn established this fund to help make certain that Balboa Park retains the lushness and beauty for which it is world-renowned. They have spent years living around and enjoying Balboa Park and have loved every minute of being in the Park on an almost daily basis as a result of operating The Prado at Balboa Park, part of the Cohn Restaurant Group. The Cohns have been very fortunate in this community, giving to a multitude of charities as a thank you to San Diego, and have chosen to dedicate funds to a place of beauty that will be enjoyed for generations to come.

Eldorado Country Club

Eldorado Country Club Charitable Fund

The Eldorado Country Club, Freddie Pennie Scholarship Fund was established at The San Diego Foundation in 1999 by 29 club members who wanted to create a memorial for a former caddie. That fund has continued to grow and provide

scholarships to the dependents of Eldorado Country Club employees who have a GPA of 3.0 or better and who have actively participated in extra-curricular school activities and/or community service.

Club members established this non-endowment fund for the purpose of providing additional scholarships, as well as grants to nonprofit organizations for charitable purposes.

Gary Fong

Furistics Fong Fund

This fund was set up to inspire and increase the awareness of family and friends of the importance of philanthropy and volunteerism. Gary believes these ideals are neither obligations nor responsibilities, but are innate qualities that human beings possess and which need to be cultivated and nurtured.

Fund Objectives: (1) To enhance the name of America overseas by providing grants to organizations that provide aid, shelter and relief to those who have suffered from natural disasters or acts of human rights violations, such as genocide, ethnic cleansing, or other political or social forces. (2) To ease the suffering of those in situations caused by disabilities, abuse, homelessness, hunger, debilitating illnesses or inadequate healthcare.

With the help of The San Diego Foundation, criteria for selecting deserving organizations will include: 1) the grant be used primarily to fund program services; and 2) the program objectives empower their ward through education, counseling and training, instead of handouts.

Larry and Margaret Foster

Jonathan Hastings Foster Scholarship Fund

Named in honor of Jonathan Hastings Foster, this scholarship will provide financial assistance to a graduating senior from Point Loma High School pursuing a teaching career.

Jonathan Hastings Foster graduated from Point Loma High School as class valedictorian in 1997 and went on to pursue his love of mathematics at the University of Virginia, where he was awarded a Jefferson Scholarship. He taught high school

math in Charlotte, NC, and then, to achieve his life-long goal of teaching at the university level, attended graduate school at San Diego State University. Jonathan was working toward his doctorate at the University of Kansas when he died in February 2006.

Remembered as an accomplished scholar, it was Jonathan's ability to see the simplicity in every complex problem that enabled him to be an exceptional teacher. Loved and respected, Jonathan was a kind and compassionate person who took every opportunity to help others. It is the hope of his family that the recipients of this scholarship will exhibit the same passion for teaching and helping others that Jonathan did.

Kevin and Wendy Gibson

Kevin and Wendy Gibson Fund

The Gibson Family established this fund as a means to give back to the community. Their mission is to support organizations that assist those in need and to provide opportunities to enhance our community. They envision that this philanthropic endeavor will provide for a better world for all of us.

Give Something Back, Inc.

Give Something Back

Give Something Back Business Products, Inc., donates its business profits to local community groups selected by its customers and employees. A balloting process is used to poll San Diego customers and employees to give the profits earned locally to San Diego-area organizations.

Chris Gopal and Diane Rosenberg

Rosenberg and Gopal Family Fund

Diane Rosenberg and Chris Gopal have lived many places and finally found "home" in San Diego. While Chris travels extensively to consult on supply chain and operations strategy, Diane volunteers her time with The San Diego Foundation's Environment Working Group, Second Chance, and San Diego Social Venture Partners.

"Our fund enables us to be knowledgeable and active members of the community, and to make informed choices about where our contributions will have the largest impact on improving lives throughout San Diego," say Chris and Diane. Their vision is to help people create self-sustainable lives within a healthy, diverse and sustainable environment.

"It seems natural to care about the environment around us, and we want to be a positive force within our community." They support organizations that teach life skills and job readiness, animal organizations that help people become self-sufficient, and environmental organizations that steward the biodiversity and natural areas of San Diego. The couple is taking an active role to make an impact now and planning to leave a portion of their estate for the Common Good Fund as their legacy.

Michael House

M. House Family Fund

Mike House has given charitable gifts to a variety of organizations for many years, however this year he made the decision to do his charitable giving in partnership with The San Diego Foundation by setting up this non-endowment fund. Mike's vision for his fund is to identify and support hard-to-find worthy causes. For example, he recently read an article about an organization that provides free wheelchairs made from lawn chairs to the poor in developing countries. He likes the idea that The Foundation can provide research and guidance for his grantmaking to ensure that his charitable investments are well-placed.

In addition to The Foundation, Mike has enlisted the help of his grandson Matthew in the grantmaking from his fund. Matthew is taking the charge seriously and recently sent "Grandpa" a well-researched report on seven organizations that would benefit from a grant from the M. House Family Fund.

Jean Collier Hurley

Collier Family Fund

The Collier Family Fund was established to honor the lives and memory of Robert L. and Frances P. Collier.

*chris
and diane*

*"It seems natural to care
about the environment
around us, and we want
to be a positive force
within our community."*

CHRIS GOPAL AND
DIANE ROSENBERG

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Photo:
Aquatic
Adventures.

THE JOHNS FAMILY FUND supports environmental education in the San Diego region with a focus on inner city youth.

David Jaffer and Farideh Mohtadi

Jaffer Family Fund

The Jaffer Family Fund was created to establish support for local charities and help improve the San Diego community.

John and Padmini Johns

Johns Family Fund

John and Padmini Johns established their family fund to support environmental education in the San Diego region with a focus on inner city youth.

Liz Keadle

Elizabeth Keadle Fund

After initially exploring the possibility of establishing a private foundation, Liz Keadle opted instead to establish two funds at The San Diego Foundation. This non-endowment fund will support various organizations, including those in the fields of science, the environment and supportive services for seniors. The second fund is a designated endowment fund to support the research of Dr. Wylie Vale at the Peptide Biology Laboratory of the Salk Institute (see page 20).

Bob Lavenstein

Robert Lavenstein Fund

This fund was established to support general charitable purposes.

Stacy Matseas

Stacy A. Matseas Charitable Fund

Stacy is excited to join The San Diego Foundation's donors and looks forward to sharing her inspiration with others. Fortunate to have had an opportunity to retire early, Stacy says she is rewarded every day in more ways than any paid workplace could. She feels that opening a fund is a long-term commitment to the nonprofit community, and she feels proud to have taken this important step. Convinced that we all can do something, when a close friend was diagnosed with breast cancer, Stacy knew she had to take action. From her first walk to benefit cancer research to her service on the American Cancer Society's

California-wide board, she is excited to explore, participate and learn.

Stacy is grateful to her parents for the comfort they provided to her and everyone around them. With the desire to do good, and the passion and ability to do so, Stacy is looking forward to her own philanthropic journey.

Drs. Arturo Mendoza and Sharon Longway

Longway-Mendoza Charitable Fund

Drs. Sharon Longway and Arturo Mendoza both come from families with long histories in medical missionary work and teaching, and their fund will support similar causes. According to Dr. Mendoza, "Science, medicine and education have always been a part of both of our lives."

The Longway-Mendoza family has been involved with projects in Hong Kong, Singapore and many other countries. Most recently, they hosted a doctor from Afghanistan in their home and then Dr. Mendoza traveled to Afghanistan to help start a pathology lab there. Their son, Brandon, has a good start in the family tradition, having accompanied his father to Afghanistan where he volunteered at the local university to teach computer skills and English.

Dr. Mendoza is the Director of Pathology and Dr. Longway is a pathologist at Sharp Mary Birch Hospital for Women. Brandon continues in his desire to support humanitarian causes by focusing his undergraduate studies in matters of international conflict resolution at Amherst College.

Ron and Lisa Oberndorfer

Ron and Lisa Oberndorfer Charitable Fund

Ron and Lisa Oberndorfer have been residents of San Diego County since 1975, and of East San Diego County since 1979. They have three children. Ron has practiced law in East County since 1980, and has served on the boards of and chaired the Wellness Community of San Diego, San Diego East County Chamber of Commerce, Foothills Bar Association, and East County Lawyer Referral Service. Ron has also served on the boards of the San Diego Jewish Academy and the Olaf Wiegthorst Museum Foundation. He currently sits on the corporate board of Sharp Grossmont Hospital, the Grossmont High School Academy Advisory Board

and the East County Healthcare Advisory Board.

Lisa has served on the Board of Directors of Temple Emanu-el. She also delivers meals to the elderly and shut-ins for Jewish Family Services and reads for the KPBS Radio Reading Service. The Oberndorfers established their fund to support organizations dedicated to the arts, education, environment, humanitarian relief, and social services.

Procopio, Cory, Hargreaves & Savitch LLP

Alec L. Cory Foundation

The law firm of Procopio, Cory, Hargreaves & Savitch LLP established this fund in 2006, the firm's 60th Anniversary, in honor of its founding partner, Alec L. Cory. While renowned for his legal and business skills, Alec Cory also instilled in the firm a deeply ingrained sense of commitment to give back to the community. Each year the firm will select multiple local organizations, with a wide variety of worthy purposes, to benefit from the fund.

Janis Prupes

Manny Prupes Fund

The Prupes family established this fund to help preserve the memory of their beloved husband, father and grandfather, Manny Prupes. Manny strived for excellence in all areas of his life, and had a strong sense of family and an exceptional work ethic. He believed in education, mentor programs and was dedicated to entrepreneurship. He was very generous and believed in teaching others how to work hard and be motivated.

The Prupes family wants to carry forward the values that were important to Manny, and this fund will support those less-fortunate individuals in pursuing their dreams and striving for excellence in their lives, as he did. The family hopes this fund will continue to grow and be beneficial in many aspects such as providing scholarships and mentor programs for children whose parents died young, leaving them no funds for college, and assisting battered and abused women in gaining self worth and an education. It's their way of giving something back as they all feel so blessed to be Manny's family.

QUALCOMM, Inc.

San Diego Science, Technology, Engineering and Math Scholarship Fund

The purpose of this fund is to provide financial assistance to local students majoring in math, science, engineering or technology, and attending either the University of California, San Diego; San Diego State University; or California State University, San Marcos.

Rancho Bernardo Community Council

RB Fire Station 33 Fund

This fund was established to support the restoration and renovation of the Rancho Bernardo Fire Station #33.

Stephen A. Rosetta

The Head North Foundation

This fund was established by the Head North Foundation in honor of Eric Northbrook who, in a fraction of a second, was thrown from his motorcycle and paralyzed from a spinal cord injury. Eric's spinal cord and other internal injuries were so severe, it is a miracle he survived the accident. From the moment of the crash, Eric made a choice to fight for his life. His unrelenting spirit remains steadfast, and he has vowed to do everything he can do to walk again.

The Head North Foundation's primary goal will be to support spinal cord research, recovery and rehabilitation. Never before has there been so much hope and optimism that a treatment and a cure for spinal cord injuries will be found. Due to Head North Foundation's low administration costs, approximately 98% of donations directly benefit recipients.

Kalpana Sathyadev

Malini E. Sathyadev Memorial Scholarship Fund

Malini Elizabeth Sathyadev was born on December 7, 1988, in San Diego. At age five, while living in Turin, Italy, she accepted Jesus Christ as her personal Savior and Lord. She attended two years of pre-school in Turin at Sacre Cuore and was fluent in Italian. Malini completed her kindergarten year at the American School of Turin, and her first 1st and 2nd grade years were at St. Andrews School in

stephen

*The Head North
Foundation's primary goal
will be to support spinal
cord research, recovery
and rehabilitation.*

STEPHEN ROSETTA

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THE CHRISTOPHER WEIL
SCHOLARSHIP FUND
This fund focuses on students
returning to college after a break
in their education.

Savannah, Georgia. In 1994, she joined Horizon Christian School and attended school there from 3rd through 9th grade.

Malini was a straight A+ student. In September 2003, she joined the University of San Diego High School as a sophomore. Malini went to be with Jesus on March 16, 2004, at the age of 15 years 3 months and 9 days. This scholarship is the legacy of her faith in Jesus and excellence in academics, sports and music.

Portia W. Shumaker

Portia Whitaker Shumaker Fund

The Whitaker Foundation closed this year after 30 years of grantmaking, and a portion of the remaining funds were allocated to the board members to donate to the charities of their choice. Mrs. Shumaker was a member of the board, and chose The San Diego Foundation to receive a portion of the funds allocated to her.

While in operation, the Whitaker Foundation played a major role in establishing biomedical engineering as a contemporary academic field. It has been nearly 50 years since Uncas Whitaker foresaw what engineers could do for medicine and human health. The Whitaker Foundation followed his idea and his entrepreneurial spirit to create a permanent infrastructure to advance medical science and heal the sick and injured.

This new fund will support a variety of cultural and scientific organizations over a period of ten years. The first grant has been made to the Juvenile Diabetes Research Foundation.

U. S. Fish and Wildlife Service

Otay Mesa Grassland Mitigation Fund

This fund was established to support management, monitoring and acquisition associated with mitigation for grassland and burrowing owl impacts from Otay Mesa development activities.

Martin and Valerie Webster

Valerie B. and Martin H. Webster Fund

Valerie and Martin Webster anticipate using their fund for a portion of their annual charitable giving program, which is matched by a private foundation of which Martin is the president and a director. The Websters have given to local nonprofit organizations for many years, primarily in the areas of art and science. Their interest stems from the activity of the organizations they support and from the fact that their principal home is in the northern part of the county. Organizations they care about most include the San Diego Opera, North Coast Repertory Theatre, the Los Angeles Philharmonic, California Institute of Technology, Los Angeles County Bar Foundation, Beverly Hills Bar Foundation, and the UCLA Medical Center Endowment Fund.

Christopher and Patricia Weil

Christopher Weil Scholarship Fund

This fund was established by the Christopher and Patricia Weil Family Foundation to encourage and support students in the belief that education will make a material difference in their lives. The fund focuses on students returning to college after a break in their education.

Marc and Joann Weinstein

Weinstein Family Fund

After initially considering a private foundation, Marc and Joann Weinstein instead opted to establish an advised fund. Their financial planner referred them to The San Diego Foundation. Marc comes from a family with a history of charitable giving. Together, Marc and Joann will recommend grants to support children, abused women, disaster relief and solutions to global warming. They are also interested in supporting orphanages in Tijuana, Mexico. Marc and Joann believe the greatest good can be done by supporting mid-size organizations where their dollars can do the most work. Lastly, the couple hopes to pass on the tradition of giving to their children.

NEW AGENCY ENDOWMENT FUNDS

NONPROFIT ORGANIZATIONS BUILD THEIR FUTURE
THROUGH *ENDOW SAN DIEGO*

Congratulations to the following Nonprofit Partners for establishing permanent endowment funds in the past year. These organizations have made a commitment to the future of the San Diego region by ensuring their long-term financial stability. We applaud their vision and dedication to our community.

Alpha Project for the Homeless

Alpha Project for the Homeless Endowment Fund

Beginning with a generous donation from the late Mary Jacobson, this fund was established to ensure the ongoing operation of the agency's programs which collectively serve more than 4,000 men, women and children each day through a



ALPHA PROJECT FOR THE HOMELESS

multitude of services, including affordable housing, HIV/AIDS outreach, substance abuse treatment, basic and emergency services, transportation assistance, mental health counseling, employment training preparation and placement, and emergency shelter.

Founded in 1986 as a project offering work opportunities for homeless men and women in Downtown San Diego, today Alpha Project operates 15 programs from 11 locations with an administrative overhead expense of less than 7%. With a devoted staff, Alpha Project focuses on empowering its clients to take personal responsibility for solving problems and has garnered numerous awards including recent national recognition by Martin Luther King, III, who credited the agency for working to end homelessness for its clients, rather than merely managing the problem.

ARTS: A Reason to Survive

The ARTS Endowment Fund

This fund will provide a dependable income stream to ensure that A Reason To Survive will continue to provide healing creative arts programs to children and families facing adversity throughout San Diego County. The first major gift to this endowment fund was in 2006 by Pam and Marty Wygod through the Rose Foundation.

A Reason To Survive, Inc. (ARTS) was founded in 2001 by artist Matt D'Arrigo, based on his philosophy that the artistic process can change and heal lives. ARTS sends trained artists, musicians, poets and dancers into facilities serving children facing adversity. Starting at just one location, ARTS has since grown to serve

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A FOUNDATION FOR YOUR PASSION

THE ARTS ENDOWMENT FUND
This fund provides a dependable income stream to ensure that A Reason To Survive will continue to provide healing creative arts programs to children and families facing adversity throughout San Diego County.



HISPANIC COMMUNITY SERVICES FUND
The Chicano Federation of San Diego County is guided by its mission to improve the quality of life of families and children.

more than 3,500 children annually at 13 partner locations including hospitals, homeless shelters, rehabilitation centers, group homes, domestic violence shelters and military bases. In addition to their outreach programs, The Pat D'Arrigo ARTS Center will open in the fall of 2006 to offer a wide variety of in-house visual, performing and literary arts programs and camps to children and families in the community facing adversity.

AVID Center

AVID Center Endowment

The Advancement Via Individual Determination (AVID) program was founded in San Diego in 1980 at Clairemont High School by Mary Catherine Swanson as a way to help underserved students go to college. The AVID Center became a non-profit organization in 1992 and the program is now offered in nearly 2,600 middle schools and high schools nationwide and in 15 countries.

AVID is an elective course for students who desire more rigorous curriculum and support in order to prepare for college. A typical AVID student is in the academic middle of his/her class and would be the first generation in his/her family to go to college. Last year, 75% of AVID seniors went on to attend four-year colleges while nationally only 29% accomplished this feat.

The AVID Center Endowment Fund will support and expand the AVID program, helping more school districts adopt AVID and ensuring that San Diego County stays on top in college-bound rates.

Chicano Federation of San Diego County

Hispanic Community Services Fund

Improving the quality of life of families and children. The Chicano Federation was founded upon that value in 1968 and it has guided the organization ever since. Today, those strong roots empower the organization to serve all of the county's diverse populations by offering programs that provide affordable housing; specialized training for those wishing to become child-care providers; subsidized child-care for infants and young children; and individually tailored services for seniors and families in crisis.

More than 11,000 people are helped by the Chicano Federation each year and more than 400 women dramatically increase their family's income by becoming entrepreneurs and opening their own state-licensed in-home day care business. For more information on the Chicano Federation, visit www.chicanofederation.org.

Classics for Kids

Classics for Kids Endowment

Classics for Kids was founded in 1994 as an educational performing arts organization dedicated to providing informative and entertaining educational programs that reach out and inspire children to appreciate great orchestral music, enriching them as human beings.

Classics for Kids educates children, families and teachers about classical music through professional orchestra concerts and programs, and each year delights more than 18,000 children from public, private and home schools at professional venues throughout San Diego County.

Classics for Kids' comfortable and inviting educational concerts are developed to inspire creativity and focus on musical values. In an effort to reach out to all children, regardless of their financial resources, Classics for Kids continues to maintain its low fees for school children. This endowment fund will help the organization continue providing affordable access to San Diego's underserved children.

Community Catalysts

Community Catalysts Endowment Fund

Community Catalysts was established over 23 years ago in Escondido to provide services for people living with disabilities. In 1989, they became the first exclusively community-based organization in California to be nationally accredited by the Commission on Accreditation of Rehabilitation Facilities (CARF), having met rigorous standards for service and quality. They have maintained CARF accreditation every year since then.

Their consumers (a client chosen name) are individuals with one or more life-affecting challenges, and the goal is to help those in need achieve their highest level of self-sufficiency. Most consumers are classified as developmentally dis-

abled, however many face physical, mental illness and other social barriers. This fund will continue to build support for essential services such as affordable community housing, crisis intervention housing, and other strategic initiatives to address the unmet needs of people living with disabilities. You may visit their web site www.communitycatalysts.org for more information.

Elementary Institute of Science

Elementary Institute of Science Endowment Fund

The Elementary Institute of Science (EIS) was founded in 1964 by elementary school teacher Tom Watts who wanted to offer a different way of teaching science to the underserved, multicultural mix of students in a low income neighborhood. To prove that children of color and girls could and would succeed in the sciences, he started an after-school science club and challenged his students to explore their world while they learned and succeeded. Throughout the past 42 years, the mission of EIS has remained the same: to nurture the intellectual curiosity of San Diego's young people and to stimulate an ongoing appreciation of science and technology by providing hands-on learning experiences.

The Elementary Institute of Science established this fund as part of The Miracle on 51st Street, a five year campaign effort to raise \$6.5 million, including \$2 million in endowment, to ensure that students continue to have the opportunity to explore the world of science at EIS.

Escondido Education Foundation

Carilyn Gilbert Education Endowment

Peggy Raymond Reading Endowment

Founded in 2004, the Escondido Education Foundation is the only nonprofit dedicated to bringing in outside dollars for children in Escondido's elementary and middle school classrooms.

Because of the dedication and involvement of Carilyn Gilbert in Escondido's schools, the Gilbert Family recognizes the long-term need for school funding and established the Carilyn Gilbert Education Endowment in honor of Carilyn. Funds will support art, music, technology, physical education, sports and literacy projects through yearly grants to teachers.

Jack Raymond, founding board member of the Escondido Education Foundation, established the Peggy Raymond Reading Endowment in honor of his mother, a long-time educator in Escondido. Jack created this fund to support literacy and library programs in the Escondido Union School District for several reasons: 1) library funding has been cut drastically in the school system; 2) his mother was a master reading teacher; and 3) reading is the key to it all.

The Escondido Creek Conservancy

The Escondido Creek Conservancy Rock Spring/Quarry Fund

The Meadowbrook Restoration Fund

The mission of the Escondido Creek Conservancy (TECC) is to preserve and protect the natural open space within the Escondido Creek watershed through land acquisition, protection agreements and cooperation with various agencies to implement land protection programs. TECC's land acquisition vision is to establish a large contiguous block of open space, wildlife habitat, and protected view sheds for the benefit of human and wildlife species within the watershed, including the downstream San Elijo Lagoon. TECC supports educational programs and compatible outdoor recreation within the watershed for the benefit of all residents of the area.

These endowment funds were established to support the maintenance of the Rock Springs Condos Restoration site (upper portion of wetlands on TECC Quarry Property) and the Meadowbrook Christian Homes Restoration site (wetland portion of the original Coler property). Both project endowments are funded by private developer projects of the same name, through off-site mitigation.



ELEMENTARY INSTITUTE OF SCIENCE
EIS was established to nurture the intellectual curiosity of San Diego's young people and to stimulate an ongoing appreciation of science and technology by providing hands-on learning experiences.



OLD MISSION SAN LUIS REY HISTORIC FOUNDATION
The purpose of this fund is to build a permanent asset to support the maintenance, preservation, restoration and enhancement of the Old Mission San Luis Rey.

Fallbrook Land Conservancy

Arthur Appleton Conservation Area Fund

Dinwiddie Preserve Fund

Engel Family Preserve Fund

Los Jilgueros Preserve Fund

The Fallbrook Land Conservancy (FLC) is a nonprofit organization dedicated to preserving and enhancing the rural lifestyle and natural beauty of Fallbrook. Since forming in 1988, the FLC has grown to a thousand members and has acquired more than 600 acres of protected open space. The open space includes nine nature preserves and the landmark Monserate Mountain. In June 2006, the Fallbrook Land Conservancy established the endowment funds listed above to provide permanent support to maintain and enhance these preserves.

Old Mission San Luis Rey Historic Foundation

Old Mission San Luis Rey Historic Foundation

Founded in 1798 and located in Oceanside, the Old Mission San Luis Rey is the largest of the California missions. Although it was the last mission to be founded in the South, the Old Mission San Luis Rey de Francia came to be the largest and richest of them all. The area is steeped with history, and the Mission's museum exhibits many artifacts highlighting the periods when Native American, Spanish Mission, Mexican Secularization, and American military groups occupied the area. Today, the Mission continues to promote the historical, educational, architectural and cultural development of California's history to all who come through its doors.

The purpose of this fund is to build a permanent asset to support the maintenance, preservation, restoration and enhancement of the Old Mission San Luis Rey for the enjoyment and benefit of the community, now and forever.

Parent Institute for Quality Education

The Parent Institute/Hess-Mardirosian Fund

The Parent Institute for Quality Education (PIQE) began in San Diego in October 1987, when Rev. Vahac Mardirosian (Pastor Emeritus) and Dr. Alberto Ochoa (SDSU Professor) invited parents at Sherman Elementary School to discuss their social

conditions, the school system and the low academic achievement of their children. Since that time PIQE has evolved into a research-based, tested and proven nine-week program on parent involvement that has transformed more than 350,000 parents from 15 language groups. PIQE's mission is to bring schools, parents and community together as equal partners in the education of every child to provide all students with the option and access of a post secondary education.

PIQE established this endowment fund with a major donation from a former PIQE board member, Lawrence Hess. PIQE also established a non-endowment fund at The Foundation this year (see page 41). Both funds will support PIQE's work to enhance and emphasize the importance of being involved in the education of all children in their homes and in the schools.

Paws'itive Teams, Inc.

PAWS'ITIVE Teams Endowment Fund

Paws'itive Teams trains service dogs to assist mobility-limited persons with the activities of daily living, helping them to achieve greater independence. Paws'itive Teams also provides therapy dogs to professionals throughout San Diego County, such as occupational and physical therapists, in facilities using the dogs as tools in goal-directed therapy.

Paws'itive Teams was founded in 1997 and is completely volunteer-run. They have been fortunate during the organization's younger years to have donated space for their facilities, but, as they continue to grow in size, they will need larger space to accommodate the program. The vision for their endowment fund is to prepare now to cover the costs, such as rent, of their future growth.

Rancho Coastal Humane Society

Rancho Coastal Humane Society Witmer Animal Care Fund

This fund was created by the late Renate Witmer through an estate gift of over \$208,000. Ms. Witmer, who was born in Germany and lived there during the war, came to the United States to start a family. She lived a simple life as a homemaker, caring for her only child. She had an undying passion for animals, which

inspired her to establish this endowment to benefit Rancho Coastal Humane Society. The fund will provide an ongoing source of support for homeless pets in Rancho Coastal's care.

Rancho Coastal Humane Society, a nonprofit organization located in Encinitas, has been serving the San Diego area since 1961. Their mission is to care for homeless companion animals and to educate the public about pet overpopulation and responsible care. The shelter provides quality shelter care, adoption services, education programs for children and adults, and an Animal Safehouse program for the pets of domestic violence victims.

United Through Reading® (Family Literacy Foundation)

The United Through Reading (Family Literacy Foundation) Endowment Fund

United Through Reading was established in 1989 as the Family Literacy Foundation, and they are planning to be around until their vision – that ALL children feel the security of caring adult relationships and develop a love of reading through the read-aloud experience – is fulfilled. Realizing that this is a big vision, they have taken steps to assure their future financial stability by establishing this endowment fund.

Income from the endowment will support their mission, which is to facilitate supportive relationships for children through families and friends reading aloud



with them. United Through Reading keeps families connected through reading aloud together in San Diego County and on ships and military bases throughout the world. They focus their efforts on children whose parents are deployed military service members, are incarcerated, or who face other significant obstacles to reading aloud with their children.

Women's History Museum

Women's History Museum and Educational Center Endowment Fund

The Women's History Museum and Educational Center (WHMEC) is the only facility in the country with research archives, exhibits, educational programs, oral histories, research library, and Women's Hall of Fame dedicated entirely to multicultural women's history.

Incorporated in 1983, the WHMEC is the lifelong dream of Mary Maschal who devoted her time, energy and home to sharing the untold story of women's history. Formerly the Women's History Reclamation Project, the WHMEC has blossomed into a full-fledged women's history museum and valuable educational resource located in the historic Golden Hill neighborhood.

Through its diverse programming, speakers and traveling exhibits, the Women's History Museum and Educational Center also reaches San Diego schoolchildren, at-risk youth and community members of all ages around San Diego County. The WHMEC relies on funds from private donors, grants and yearly memberships to maintain its programs and exhibits.

By partnering with The Foundation, nonprofits obtain the economies and potential rewards of participating in a larger investment pool, and they enhance their ability to accept large and complex gifts such as real estate or stock. The Foundation offers professional investment management and reporting services, allowing each nonprofit to focus on its core services and constituencies rather than asset management.

If you would like to make a contribution to an organization's endowment fund, please call The San Diego Foundation at (619) 235-2300 or contact the organization directly.

w.h.m.e.c.

The Women's History Museum and Educational Center is the only facility in the country with research archives, exhibits, educational programs, oral histories and a library dedicated entirely to multicultural women's history.

WOMEN'S HISTORY MUSEUM
AND EDUCATIONAL CENTER
ENDOWMENT FUND

A FOUNDATION FOR YOUR PASSION

NEW AGENCY NON-ENDOWMENT FUNDS

AIA San Diego Chapter

AIA San Diego 2003 National Convention Legacy Fund

The purpose of this fund is to support the objectives of AIA San Diego.

Barrio Logan College Institute

Barrio Logan College Institute Fund

The Barrio Logan College Institute (BLCI) develops innovative, effective college preparation programs for bilingual and bicultural students and their families. With generous support from the San Diego community, BLCI helps ensure that future generations of Barrio Logan students have the confidence, guidance and resources to attain a higher education and, often, become the first in their families to go to college.

BLCI was founded in 1996 in response to statistics showing that Latino students drop out of high school at alarmingly high rates. Beginning with only 12 elementary school students in after-school tutoring programs, BLCI now serves over 100 elementary, middle and high school students through free after-school enrichment programs, tutoring and mentoring services, college and career exploration, parental support, field trips and workshops. BLCI is proud of its 100% success rate for high school graduation and college acceptance among its alumni.

Center for Community Solutions

North County Family Violence Prevention Center (NCFVPC) Fund

This fund was established to support the North County Family Violence Prevention Center.

Christ Church Unity

Christ Church Unity Fund

The purpose of this fund is to support Christ Church Unity.

District Attorney's Office

San Diego County Safe Communities Fund

The San Diego County District Attorney's Office prosecutes all felony crimes in San Diego County and all misdemeanor crimes outside of the City of San Diego. The employees of the San Diego District Attorney's Office, in partnership with the community they serve, are dedicated to the pursuit of truth, justice and protection of the innocent, and the prevention of crime through the vigorous and professional prosecution of those who violate the law. The District Attorney's Office is heavily involved in an array of innovative community initiatives focused on increasing public safety in San Diego County. This fund will provide financial support for new and existing public safety initiatives of the District Attorney's Office to aid in reducing crime and increasing public safety throughout the San Diego County.

Environmental Land Solutions

Deer Canyon Conservation Fund

The purpose of this fund is to support the management, monitoring, maintenance and preservation of the Deer Canyon Conservation Bank.

Escondido History Center Endowment Foundation

Escondido History Center Fund

The Escondido History Center was formed in 1956 as the Escondido Historical Society to ensure that Escondido's history is preserved forever. The History Center's collection includes over 7,000 photographs and 15,000 artifacts. The Center's museum in Grape Day Park is comprised of six historic buildings, including the city's first public library and the Santa Fe Depot. Education is at the heart of the History Center's mission. In addition to afternoon museum tours for the



BARRIO LOGAN COLLEGE INSTITUTE FUND
BLCI helps ensure that future generations of Barrio Logan students have the confidence, guidance and resources to attain a higher education and, often, become the first in their families to go to college.

general public and 3rd grade local history tours, the Center offers classes in blacksmithing, a monthly lecture series, walking tours of historic Escondido, group presentations and events. The Center also assists the City of Escondido with historic preservation issues.

Escondido Rotary Foundation

Escondido Rotary Foundation Fund

The Escondido Rotary Foundation benefits charitable purposes of the Escondido Rotary Club including, but not limited to, programs for youth, senior citizens, and the physically or mentally challenged. The Foundation's board is composed of nine trustees: three Escondido Rotary Club past presidents, three elected fellow Escondido Rotary Club members, and the three club officers representing three of the four Rotary Avenues of Service: Community, International, and Vocational.

InterAmerican College

Building Democracy Through Education Fund

InterAmerican College, a young institution of higher education, is one of four Latino colleges in the United States, and the only one in Southern California and the Southwest. IAC was established in 1997 in National City to serve primarily low-income adult learners in San Diego County. IAC does not discriminate and is presently serving a multiethnic, diverse population of American and naturalized citizens.

The goal of InterAmerican College is to address two critical areas of needs facing our communities – education and healthcare – through the preparation of bilingual and culturally-diverse teachers and health professionals. During its short existence, IAC has granted 60 undergraduate degrees and approximately 30 California teaching credentials. In the area of healthcare, IAC is starting the first Latino nursing school in Southern California for the preparation of registered nurses and nurse practitioners at the undergraduate and graduate levels.

Parent Institute for Quality Education

The Parent Institute/Hess-Mardirosian Fund

The Parent Institute for Quality Education (PIQE) began in San Diego in October 1987, when Rev. Vahac Mardirosian (Pastor Emeritus) and Dr. Alberto Ochoa (SDSU Professor) invited parents at Sherman Elementary School to discuss their social conditions, the school system, and the low academic achievement of their children. Since that time PIQE has evolved into a research-based, tested and proven nine-week program on parent involvement that has transformed more than 350,000 parents from 15 language groups. PIQE's mission is to bring schools, parents and community together as equal partners in the education of every child to provide all students with the option and access of a post secondary education.

PIQE established two funds at The San Diego Foundation this year – an endowment (see page 38) and this non-endowment fund to provide immediate support for PIQE's work to enhance and emphasize the importance of being involved in the education of all children in their homes and in the schools.

Sidney Kimmel Cancer Center

Sidney Kimmel Cancer Center Fund

The Sidney Kimmel Cancer Center is located on a 10-acre campus atop the Torrey Pines Mesa area of San Diego in the center of one of the largest concentrations of biotechnology/health science companies, research institutes, cancer centers, and pharmaceutical research and development institutes in the world.

Founded in 1989, the mission of the Sidney Kimmel Cancer Center is to translate laboratory discoveries into non-toxic treatments for cancer. A regional and national resource for research into the biology of the cancer cell and its vasculature, the Sidney Kimmel Cancer Center has succeeded in translating that information into genetics tests for therapy selection as well as new treatment strategies for cancer which are less toxic and more effective than existing treatment modalities.



A FOUNDATION FOR YOUR PASSION

THE PARENT INSTITUTE/ HESS-MARDIROSIAN FUND

This fund's mission is to bring schools, parents and community together as equal partners in the education of every child to provide all students with the option of and access to a post secondary education.

UNDERSTANDING THE SAN DIEGO REGION

WE MUST UNDERSTAND. THEN WE CAN ACT.

The San Diego Foundation is a results-focused and action-oriented organization that engages all segments of the community to improve the quality of life in the San Diego region.

By closely monitoring local issues, opportunities and resources, The Foundation maintains an in-depth understanding of the region's challenges and the organizations addressing them. Our goal is to provide leadership in addressing critical community needs and to create the best possible environment for individuals of goodwill to channel their resources to enhance the common good.



Working Group Strategies

Guided by The San Diego Foundation's Community Partnerships Committee and Board of Governors, volunteer Working Groups and Committees employ the following strategies in seven key subject areas.








- STRATEGY 1:** Based on research and community knowledge of priority areas, develop publicly-supported initiatives with clear and measurable community impact results.
- STRATEGY 2:** Through the Community Impact Grants Program, channel resources to organizations that demonstrate innovative approaches to meeting the goals of the Working Groups' initiatives.
- STRATEGY 3:** Engage and inspire donors to build financial support and long-term endowments for causes important to them.
- STRATEGY 4:** Actively seek and bring in outside funding from local, regional and national funders to achieve community impact goals.
- STRATEGY 5:** Encourage and foster cooperation, partnerships and collaboration within the San Diego nonprofit community.



The Foundation brings new resources to the region

The Foundation has been awarded more than \$1.4 million in multi-year grants from the following foundations to support our Working Group strategies and grantmaking.

- California Wellness Foundation
- Annie E. Casey Foundation
- Ford Foundation
- Leo S. Guthman Fund
- The James Irvine Foundation
- Marisla Foundation
- Resource Legacy Fund Foundation
- Zell Family Foundation

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	environmentpg 48-49
	health & human servicespg 50-51
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	scholarships.....pg 54-55
	organizational successpg 58-59



arts and culture

WORKING GROUP



San Diego Guild of Puppetry

COMMUNITY IMPACT



Malashock Dance

Vision

To galvanize the San Diego community around enhanced arts and culture and to ensure that the San Diego region has all the resources to become a nationally-competitive arts and culture center by 2009.

pARTicipate San Diego Initiative

This past year, The San Diego Foundation conducted its latest Understanding the San Diego Region research study on the state of arts and culture participation in San Diego County. Based on the findings, the Arts & Culture Working Group developed pARTicipate San Diego, an initiative to increase cultural patronage by expanding and deepening all San Diegans' involvement with arts and culture through advocacy, arts and education efforts, and strategic grantmaking.

San Diego Symphony



Asian Story Theatre



pARTicipate San Diego – The Case of Increased Cultural Patronage

KEY FINDINGS REVEAL THE ATTITUDE OF SAN DIEGO COUNTY RESIDENTS:

- 1) Cultural participation needs to be deepened and expanded.
- 2) The region's arts and culture community is under-funded.
- 3) People care about the arts – two-thirds of those surveyed would be willing to pay more taxes to support arts and culture.
- 4) The region places a high priority on increasing arts education in public schools.
- 5) The San Diego Foundation should be a catalyst to help strengthen the arts and culture sector through community leadership, advocacy and funding.

To view or download a copy of the report, visit www.pARTicipateSanDiego.com.



2006 Arts & Culture Grants

\$197,255

Asian Story Theatre.....	\$12,000
Athenaeum Music & Arts Library	\$1,000
California Ballet.....	\$15,000
Centro Cultural de la Raza	\$12,500
Cygnet Theatre Company	\$10,000
Eveoke Dance Theatre	\$15,000
Installation Gallery	\$20,000
Malashock Dance	\$7,000
Mo'olelo Performing Arts Company	\$20,000
Museum of Contemporary Art, San Diego.....	\$12,000
San Diego Guild of Puppetry.....	\$12,500
San Diego Natural History Museum.....	\$20,000
San Diego Opera.....	\$20,000
San Diego Youth Symphony and Conservatory	\$15,255
Sun & Moon Vision Productions	\$5,000

Arts & Culture

WORKING GROUP MEMBERS 2005-2006

CHAIR: **Roger Cornell, M.D.**

VICE CHAIR: **Elizabeth Yamada**

FOUNDATION STAFF: **Julie Fry**, *Director*, Arts & Culture Analysis and Strategy

Roger Cornell, M.D.^(B)

Senior Consultant, Department of Dermatology, Scripps Clinic

Teddy Cruz

Architect and Binational Civic Activist

Martha Dennis, Ph.D.^(B)

Principal, Gordian Knot

Peter Ellsworth

Executive Director, Legler Benbough Foundation

Tom Hall^(B)

Principal, AlbertHall & Associates

Former Executive Director, The Old Globe

Victoria Hamilton

Executive Director, City of San Diego Commission for Arts and Culture

Judith Harris

Former Chair, City of San Diego Commission for Arts and Culture

Community Leader

Colette Carson Royston, R.N., M.N.^(B)

Immediate Past Chair, Board of Governors, The San Diego Foundation

Managing Member, Carson-Royston Group

Michael Schudson

Professor of Communication, UC San Diego

Fiona Tudor

Executive Director, Farrell Family and ResMed Foundations

Elizabeth Yamada^(B)

Community Leader

^(B) Board of Governors, The San Diego Foundation

civil society

WORKING GROUP



Photos provided by San Diego Housing Federation

Vision

San Diego is a region in which residents care about one another and are actively involved in improving the quality of life in their neighborhoods. Such a community is characterized by its appreciation of diversity, openness to creative thinking and effective problem-solving.

A New Consensus for Housing Initiative

The San Diego region requires a new consensus by residents, organizations and businesses to address the need for housing, and plan for balanced and equitable future growth. The goal of this initiative is to establish a unified vision and strategic plan for the San Diego region by 2009 that will result in livable communities with choices for all.



Issues surrounding housing are enormously important to San Diegans personally, and to the San Diego region. It is critical that everyone in San Diego have an opportunity to participate in a process of discussing and reaching a consensus on what we want our community to become. The Foundation is uniquely positioned to encourage this community discussion. We come to the issue without an agenda of what the outcome should be, but instead with a commitment to welcoming broad, inclusive, and thoughtful problem solving and planning.

– STEVEN SMITH, CHAIR OF THE CIVIL SOCIETY WORKING GROUP



2006 Civil Society Grants

\$73,500

Greater Golden Hill Community Development Corporation\$30,000

San Diego Housing Federation\$43,500

Civil Society

WORKING GROUP MEMBERS 2005-2006

CHAIR: **Steven Smith**

VICE CHAIR: **Jennifer Adams-Brooks**

FOUNDATION STAFF: **Mariano Diaz**, *Senior Vice President*, Community Partnerships

Jennifer Adams-Brooks^(B)

President, Clark Consultants

Gordon Boerner

Senior Vice President, San Diego National Bank

Christa Burke

Community Volunteer

Elizabeth Corrow

Finance Manager, The San Diego Foundation

Thomas N. Fat^(B)

Attorney and President, Fat City, Inc.

Lynn Owens

Community Volunteer

Felicia Shaw

Program Manager, San Diego Commission for Arts and Culture

Steven R. Smith^(B)

Dean, California Western School of Law

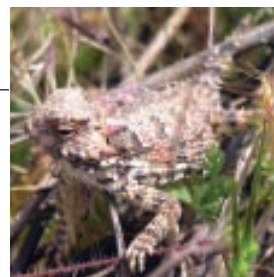
Edwina Welch

Director, Cross Cultural Center, UC San Diego

^(B) Board of Governors, The San Diego Foundation

environment

WORKING GROUP



Canyon wildlife.

Protecting San Diego's Canyons

San Diegans love their neighborhood canyons. These urban escapes of open space and natural beauty also serve critical ecological functions, such as filtering pollutants out of storm-water runoff and providing habitat to many endangered species and wildlife.

The San Diego Foundation recognizes that our canyons are vital for the region's long-term health, both for people and the environment. Since 2001, the Environment Working Group has awarded \$346,000 to the San Diego Chapter of the Sierra Club and other local organizations to protect our canyons from the threats of urban densification by bringing residents together to become advocates for the canyons in their neighborhoods.



Photo by Pam Hayhurst

32nd Street Canyon Task Force's Tershia D'Elgin teaches local school children about unique canyon and creek habitats.

Vision

To ensure that all generations enjoy clean air, safe water, wildlife, and natural and cultural heritage areas.

Land and Watershed Conservation Initiative

This initiative will advance the completion of a network of recreational parks and natural areas on rivers, canyons, lagoons and beaches to provide healthy lands, clean water and habitat for people and wildlife.

Clean Environments, Healthy Communities Initiative

This initiative will support efforts to enhance human health and human environments, particularly among populations that bear a disproportionate share of pollution in our region, such as the residents of San Diego's southern bay front communities and tribal reservations.



2006 Land and Watershed Conservation Grants**\$340,000**

32nd Street Canyon Task Force	\$25,000
Back Country Land Trust of San Diego	\$35,000
Conservation Biology Institute	\$35,000
Endangered Habitats League	\$40,000
San Diego Conservation Resources Network	\$30,000
San Dieguito River Valley Conservancy	\$15,000
Sierra Club, San Diego Chapter.....	\$35,000
Southwest Wetlands Interpretive Association	\$35,000
Trust for Public Land.....	\$30,000
Volcan Mountain Preserve Foundation	\$30,000
Wildlife Research Institute	\$30,000

Clean Environments, Healthy Communities Initiative Grants**\$260,000**

Environmental Careers Organization	\$30,000
La Jolla Band of Luiseno Indians	\$40,000
Pala Band of Indians	\$25,000
Rural Community Assistance Corporation	\$45,000
San Diego CHOICE Program	\$45,000
Urban Corps of San Diego	\$40,000
Walking Shield American Indian Society.....	\$35,000

2006 Blasker Environment Grants**\$163,330**

San Diego County Mammal Atlas.....	\$30,000
<i>Dana Morin, San Diego State University</i>	
<i>Scott Tremor and Phil Unitt, San Diego Natural History Museum</i>	
Development of a Novel Bio-inspired Filtration Technology	\$23,800
<i>Dr. Julio Valdes, San Diego State University</i>	
Quantifying and Modeling Soil Erosion and Sediment Export from San Diego Watersheds.....	\$25,130
<i>Dr. Edward Beighly, San Diego State University</i>	
Melding Teaching and Technology to Study Predator-Prey Interactions in San Diego's Seagrass Habitat	\$30,000
<i>Dr. Kevin Hovel and Dr. Helen Regan, San Diego State University</i>	
San Diego Tracking Team Wildlife Monitoring Data Analysis	\$24,000
<i>Stewart Bernard Long & Cristiano Giovando, San Diego Tracking Team</i>	
Invaders at the Interface (Wetland ecosystem response to invasive species removal)	\$30,400
<i>Christine Whitcraft, UCSD/Scripps Institute of Oceanography</i>	
<i>Dr. Jeff Crooks, Southwest Wetlands Interpretive Association</i>	

Environment**WORKING GROUP MEMBERS 2005-2006**

CHAIR:	Steven McDonald, Esq.
VICE CHAIR:	Diane Coombs
FOUNDATION STAFF:	Emily Young, Ph.D. , Associate Vice President of Community Partnerships and Director of Environment Analysis and Strategy

Diane Coombs
Vice President, Citizens Coordinate
for Century 3

Janie DeCelles
Long Term Care Consultant

Jim Fletcher
Superintendent, Bureau of Indian
Affairs, Southern California Region

Conny Jamison^(B)
Former San Diego City Treasurer

Peggy Lauer
Coordinator, WELL Network

Andrew Lissner, Ph.D.
Regional Director and Senior Scientist,
SAIC Environmental Sciences Division

Steven McDonald, Esq.
Environmental Attorney
Partner, Luce, Forward,
Hamilton & Scripps

Tom Oberbauer
Chief of Land Use, San Diego County
Department of Planning & Land Use

David Pellow, Ph.D.
Director, California Cultures in
Comparative Perspective
Associate Professor,
Department of Ethnic Studies
UC San Diego

^(B) Board of Governors, The San Diego Foundation

Susan Randerson
Environmental Docent/
Teacher/Community Volunteer

Diane Rosenberg
Social Venture Partner
Brand Strategy Advisor

Mike C. Thometz
President, MERIT

David Welborn, Ph.D.
Retired Psychologist

OUTREACH SUBCOMMITTEE

Carolyn Beall Colwell
Former Nursing Instructor

Diane Coombs
Vice President, Citizens Coordinate
for Century 3

Joan Embery
Wildlife and Environmental
Conservationist,
Embery-Pillsbury Ranch

William Kuni
Founding Chair,
Environment Working Group
President & CEO, HWK Investments

health & human services

WORKING GROUP



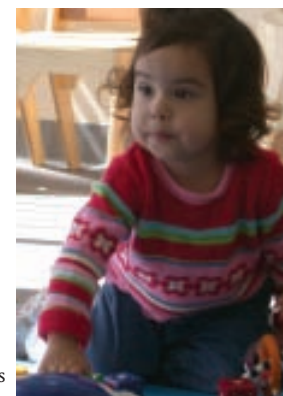
Community HousingWorks

Vision

To improve the health, wellbeing and self-sufficiency of individuals, families and communities in the San Diego region.

The Prevention of Family Homelessness Initiative

The Health & Human Services Working Group's research, investigation and grant awards indicate that families who are vulnerable to episodic homelessness benefit from financial education that leads to budget management, traditional banking relationships and increased savings. This initiative will create a county-wide program to prevent family homelessness through financial education and asset building programs of community-based organizations that serve residents of the San Diego region.



Family Health Centers



Internatioinal Rescue Committee

Nonprofits Working Together: The San Diego Family Asset Building Coalition

With Foundation support and funding from the Annie E. Casey Foundation, three Foundation grantees — Community HousingWorks, Casa Familiar and MAAC Project — have come together to create the San Diego Family Asset Building Coalition. The Coalition is joining forces, pooling resources and knowledge, to strengthen the support services, social networks, physical infrastructure, employment, self-determination and economic vitality of distressed communities. The group has already been asked to share its “best practices” with communities along the border region in California, Texas, New Mexico and Arizona.



Financial education course led by Casa Familiar.

2006 Financial Literacy Initiative Grants

\$242,016

Casa Familiar	\$29,336
Community HousingWorks	\$46,336
International Rescue Committee	\$46,336
MAAC Project	\$50,736
North County Lifeline	\$34,336
Supportive Parents Information Network	\$34,936

2006 Health & Human Services Grants

\$73,577

Casa De Amparo	\$22,000
Family Health Centers of San Diego	\$20,000
San Diego Hospice & Palliative Care	\$15,000
United Cerebral Palsy Association	\$16,577

Health & Human Services

WORKING GROUP MEMBERS 2005-2006

CHAIR: **Amy Okamura, MSW, ACSW**

VICE CHAIR: **Arturo Rivera**

FOUNDATION STAFF: **Mariano Diaz**, *Senior Vice President*, Community Partnerships

Barbara Bamberger
Social Scientist, EDAW

Judith Bardwick, Ph.D.
Psychologist/Author/Lecturer/Consultant

Jim Bliesner
Director, San Diego City County, Reinvestment Task Force

Jorge Cabrera
Executive Director, Casey Family Programs

Amethyst Cureg, M.D.
*Medical Director, Maternal, Child and Family Health Services,
County of San Diego, Health and Human Services Agency*

Steve Eldred
Program Officer, The California Endowment

Nora Faine, M.D.^(B)
Vice President and Chief Medical Officer, Sharp Health Plan

Catalina Hope, MBA, MSW
Social Services, Aurora Behavioral Health

Thomas Murphy
Community Leader

Barry Newman, Esq.
Retired Banker and Attorney

Amy Okamura, MSW, ACSW
Professor, San Diego State University, School of Social Work

Arturo Rivera
Vice President, Regional Manager, Washington Mutual Bank

Rene Santiago
Deputy Director, Health & Human Services Agency

Alan Sorkin
Vice Chairman, San Diego Social Venture Partners

^(B) Board of Governors, The San Diego Foundation

science & technology

WORKING GROUP



The Foundation supports professional development of teachers

Experts agree that innovative teacher training is needed to create a rich educational system that will provide our future scientists, mathematicians, engineers and researchers needed to support and maintain the San Diego region's economic well-being and leading edge institutions.



San Diego Science Alliance

Vision

To enhance science and technology in San Diego by funding innovative research and emerging scientists, as well as supporting science education and access to technology.

K-12 Math and Science Education Initiative

In 2004, the Science & Technology Working Group commissioned an *Understanding the San Diego Region* research report on the state of mathematics and science education in San Diego County. Based on the findings, the Science & Technology Working Group developed this initiative to create a future San Diego where all students — regardless of geography, ethnicity, and economic background — are scientifically literate, participate in enrichment activities, and have the capability to choose careers in science and technology, so they can actively contribute to the scientific and technical innovation of the San Diego region.

MSSELI

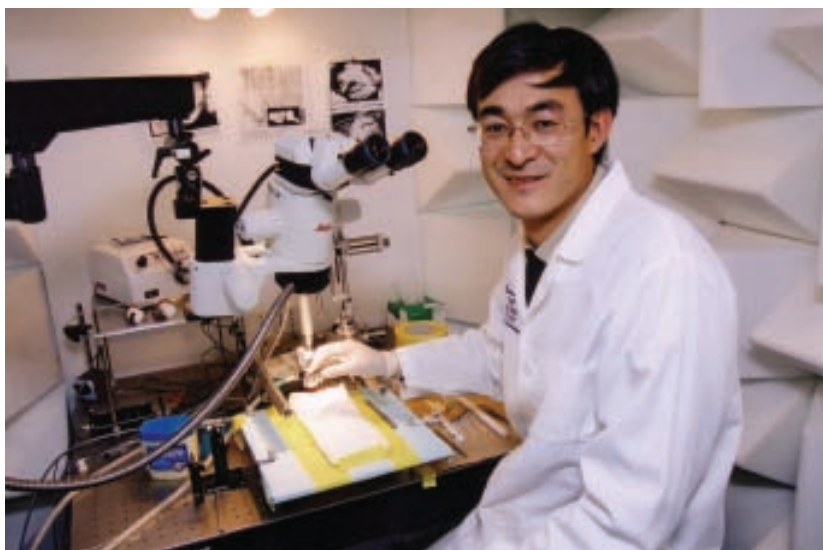
In 2003, The San Diego Foundation partnered with the San Diego County Office of Education, San Diego Unified School District and the San Diego Science Alliance to establish the Middle School Science Education Leadership Initiative (MSSELI). MSSELI (*pronounced MISSELY*) is an intensive professional development program for middle school science teachers that focuses on innovative science content, leadership strategies, and collaborations with local public and private scientific institutions.

The San Diego Foundation's Science & Technology Working Group has been an extraordinary partner to the K-12 science community. They have really come to understand important core issues for improving science literacy with children and teachers in San Diego.

— MICKIE BEYER, EXECUTIVE DIRECTOR,
SAN DIEGO SCIENCE ALLIANCE

2006 Science & Technology Grant**\$100,000**

San Diego Science Alliance \$100,000

2006 Blasker Science & Technology Grants**\$380,330**Neural Mechanisms of Experience Dependent Brain Plasticity\$65,000
*Dr. Weimin Zheng, Neurosciences Research Institute*Where to Look Next: The role of prior experience in eye movement
choices for corneal transplant patients and normal controls\$62,500
*Dr. Leanne Chukoskie, Salk Institute for Biological Studies*Catalysis of Waste-free Reactions of Interest to Medicinal Chemists\$60,000
*Dr. Douglas Grotjahn, San Diego State University*Exploring the Quantum Nature of Light\$66,830
*Dr. Matt Anderson, San Diego State University*The Role of Maternal Effects and Environmental Conditions
on Larval Performance of the California Sheephead\$60,000
*Dr. Todd Anderson, San Diego State University*Role of Calcium in Inhibitory Synaptic Plasticity\$30,000
*Dr. Julie Haas, University of California San Diego*Interpretation and Dissemination of Coastal, Seismic and
Geological Characteristics of the San Diego Region
Using Interactive 3D Visualization Techniques\$36,000
Dr. Debi Kilb and Atul Nayak, UCSD / Scripps Institute of Oceanography

Dr. Weimin Zheng,
Neurosciences
Research Institute

Science & Technology**WORKING GROUP MEMBERS 2005-2006**

CHAIR: **Jerry Hoffmeister**
 VICE CHAIR: **Martha Dennis, Ph.D.**
 FOUNDATION STAFF: **Sedra Shapiro, Director, Science & Technology Analysis and Strategy**

Henry Abarbanel, Ph.D.
*Professor of Physics and Research Physicist,
 Scripps Institution of Oceanography, UC San Diego*

Rick Beach, Ph.D.
*Chief Innovation Wizard, Classroom of the Future Foundation
 President, Amazing Possibilities Foundation*

Julia Brown
Executive Vice President, Amylin Pharmaceuticals

Martha Dennis, Ph.D.^(B)
*Principal, Gordian Knot
 Chair, City of San Diego Science and Technology Commission*

Joe Farrage
Chairman and Co-owner, Mad Science of San Diego

Jerry Hoffmeister^(B)
*President, Board of Trustees, EJE Elementary Academy
 Retired executive in the high technology engineering industry*

Denise Lew, Ph.D.^(B)
*Senior Licensing Officer, UC San Diego Technology Transfer
 and Intellectual Property Services*

Barbara Sawrey, Ph.D.
Vice Chair, Department of Chemistry & Biochemistry, UC San Diego

Ned Smith, Ph.D.
Organizational Consultant

Sam Takahashi
Engineering Consultant and founder of several telecommunications companies

Carisa Wisniewski, CPA^(B)
Partner, Moss Adams LLP

^(B) Board of Governors, The San Diego Foundation



community scholarship program

INVESTING IN THE LEADERS OF TOMORROW

The San Diego Foundation's Community Scholarship Program provides financial assistance to local students who seek post-secondary education. This year, The Foundation awarded nearly **\$2.3 million in scholarships to more than 500 students.**

The Community Scholarship Program encourages individuals, businesses, and organizations to establish scholarship funds, actively engages donors and community volunteers in the selection process, monitors the progress of recipients, and connects students to local, regional and national resources.

Over the past nine years, **The Foundation has become the largest provider of scholarships in San Diego County**, excluding the financial aid provided by colleges and universities, and the Community Scholarship Program is one of the most comprehensive and replicated in the nation.

The Community Scholarship Program was established by The San Diego Foundation in 1997 to assist local students in their educational endeavors. Since this time, over **\$8 million in scholarships** have been awarded.



Frank Ault, Chair of the Scholarship Selection Committee, with Christina Cafules, 2006 recipient of the Frank H. Ault Scholarship.

“

QUOTES FROM SCHOLARSHIP RECIPIENTS

Not only has your scholarship aided me in my financial situation but it has given me more confidence for my endeavors ahead of me.

CAITLIN DOUGHTY, RECIPIENT OF THE SAN DIEGO FIRE VICTIMS' SCHOLARSHIP, ATTENDING CITY UNIVERSITY OF NEW YORK – HUNTER COLLEGE

I am writing this letter to express my unending happiness and gratitude on receiving these scholarships. You have given me an opportunity to achieve my dream.

DANIEL GARCIA, RECIPIENT OF THE CHARLES & ARDEL HAMILTON, KAWANO FAMILY, AND RAYMOND A. TICE SCHOLARSHIPS, ATTENDING HARVEY MUDD COLLEGE

I feel so blessed to have this opportunity and very fortunate that there are people in this world like you who give so much to students to achieve higher education.

DIANDRA LEGASPI, RECIPIENT OF THE RAYMOND A. TICE SCHOLARSHIP, ATTENDING SAN DIEGO STATE UNIVERSITY

I am very thankful for receiving help to pursue my goal as an engineer. It is an honor to be recognized in this way.

JESUS LEON, JR., RECIPIENT OF THE SAN DIEGO SCIENCE, TECHNOLOGY, ENGINEERING, AND MATHEMATICS SCHOLARSHIP, ATTENDING SAN DIEGO STATE UNIVERSITY

It means a lot to receive money for my education, especially since my family and I don't have the funds necessary.

JENNIFER NEWTON, RECIPIENT OF THE HERMAN H. DERKSEN AND CAFCS-SAN DIEGO SCHOLARSHIPS, ATTENDING THE ART INSTITUTE OF SAN DIEGO

Upon graduation, I will hopefully be able to do for others the same thing you are doing for me right now.

EVA GABRIELA BAYLON, RECIPIENT OF THE CHRISTOPHER WEIL SCHOLARSHIP, ATTENDING SAN DIEGO CITY COLLEGE

”

The San Diego Teachers' Fund

SUPPORTING CREATIVITY AND INNOVATION IN THE CLASSROOM

Though few would deny that the education of our children is one of the highest priorities of our community, there never seems to be enough funding. San Diego teachers step forward year after year, often reaching into their own pockets, to develop programs that give students the extra help and motivation they need.

The San Diego Foundation established the **San Diego Teachers' Fund** to provide grants to elementary public school teachers for the development and implementation of creative and innovative classroom projects. *The Arts in the Classroom* program was added to assist high school arts teachers when funds are insufficient or unavailable.

This year, the San Diego Teachers' Fund provided \$98,500 in grants. Since inception, the program has awarded over \$600,000 to teachers throughout the County.



With a Teachers' Fund Grant, Nina Dixon led her class at Freese Elementary School in a mask and puppet production based on African myths which involved research in literature, social studies, and traditional African arts.

Community Scholarship Program

SCHOLARSHIP SELECTION COMMITTEE MEMBERS 2005-2006

CHAIR: **Frank Ault**
 VICE CHAIR: **Todd W. Gutschow**
 FOUNDATION STAFF: **Valerie A. Attisha**, Director, Scholarships and San Diego Teachers' Fund

Michel Anderson
Proprietor, Michel Anderson & Associates

Frank Ault
Retired Senior Vice President and Controller, Sempra Energy

Sandra I. Arkin
Strategic Planning Consultant

Linda Bernstein
Retired President, SeaSpace Corp.

Berit Durler
Executive Director, San Diego Charitable Real Estate Foundation

Jane Trevor Fetter^(B)
Community Leader

Todd W. Gutschow
Founder, HNC Software

Vicki Gee Horiye
Director of Marketing, Del Mar Database

Robert P. Ito
CEO, Ito Gerard & Associates

Jack Port
President, Port Investments

Marty Ries
Retired school teacher

Ardyth Shaw
Volunteer Resource & Development Coordinator, County of San Diego - Polinsky Children's Center

Raymond Thomas^(B)
Former Vice President and CFO, HNC Software

Wendy Urushima-Simmons
Community Action Manager, KGTV

John Wylie^(B)
Co-Founder, CapitalWorks Investment Partners

San Diego Teachers' Fund

COMMITTEE MEMBERS 2005-2006

CHAIR: **Dennis Arriola**
 VICE CHAIR: **Carmen Herrera**
 FOUNDATION STAFF: **Valerie A. Attisha**, Director, Scholarships and San Diego Teachers' Fund

Dennis Arriola^(B)
Senior Vice President & CFO, SDG&E and SoCalGas

Nick Aguilar
Retired Director of Student Policies and Judicial Affairs, UC San Diego

Nancy Fisher
Retired school teacher

Carmen Herrera
Business Conduct Program Manager, Sempra Energy

James Justus
Proprietor, James Automotive

Nancy Kostman
Managing Partner, Montana Forrest Products

Susan Wolking, Ph.D.
Executive Director, Girard Foundation

^(B) Board of Governors, The San Diego Foundation

ORGANIZATIONAL SUCCESS

Increasing nonprofits' capacity to serve is one of the ways that The San Diego Foundation invests in the community.

The Foundation's Organizational Success (OS) Department develops and provides resources and tools to strengthen the region's nonprofit sector. The OS Team manages the Organizational Success Program Working Group, the Nonprofit Partnership Program of *Endow San Diego*, and The Foundation's Nonprofit Resource Center.

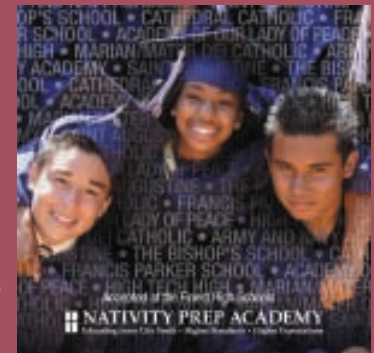
New to Organizational Success this year is the IMPACT Program (Inspiring Management, Program Accountability, and Trust). Selected participants are chosen by the Organizational Success Program Working Group.

Also new in 2005-2006 is the development of the San Diego Organizational Network (SDOrgNet.org). This online, searchable database provides information on the region's capacity building resources available to nonprofits and individuals, as well as information on consultants who support nonprofits. For more information, please visit www.sdorgnet.org.

Nativity Prep Academy joined the *Endow San Diego* Nonprofit Partnership to gain assistance in building and growing their endowment.

Nativity Prep opened its doors in 2001 in Logan Heights to address the educational divide in this poverty stricken area. The Academy's purpose is to break the cycle of poverty through education by providing a tuition-free college prep middle school education to under-served children from southeast San Diego.

A true *Endow San Diego* success story, Nativity Prep received a \$100,000 endowment gift earlier this year. Their endowment will ensure the long-term stability of the school and provide scholarships to many future generations of students. Congratulations, Nativity Prep Academy!



NONPROFIT PARTNERSHIP PROGRAM

Endow San Diego's Nonprofit Partnership Program officially launched on October 15, 2005, at The San Diego Foundation's 30th Anniversary celebration. A year later, we are pleased to report that over 200 regional organizations have joined the Nonprofit Partnership Program.

In 2004, The Foundation surveyed a number of organizations in the region and found that over 70% of the responding organizations did not have endowments or a formal planned giving program. While organizations were ready for the challenge and understood the importance of endowments, especially in a fluctuating economy, limited internal resources and expertise often hindered them from getting started. *Endow San Diego's* Nonprofit Partnership Program was created to inspire, educate and assist nonprofits in building and growing their endowments.

Nonprofits benefit in many different ways by joining the Nonprofit Partnership Program. Each partner receives a toolkit filled with planned giving and marketing materials. Partners are invited to participate in educational forums that provide additional resources and information on starting an endowment campaign, and they may also take advantage of peer-to-peer online exchange through the Nonprofit Partner Listserv.

Select, actively-engaged Nonprofit Partners also receive consulting support from a planned giving and endowment expert, and all partners are invited to participate in other workshops that The Foundation's Organizational Success department offers.

For more information on *Endow San Diego's* Nonprofit Partnership Program, contact us at NonprofitPartnershipProgram@endowsandiego.org or visit www.endowsandiego.org.



The Nonprofit Partnership Toolkit contains planned giving and marketing materials that can be customized by each organization.





organizational success program

WORKING GROUP

Vision

A successful nonprofit sector that enhances the quality of life in our communities and the region, and where nonprofit organizations will meet a double bottom-line: mission achievement and financial health that ensures the sector's vitality in the future.

Strategies

- 1) **Nonprofit Resource Center** – Available to all nonprofit organizations in the San Diego region, the Nonprofit Resource Center provides access to a variety of practical and useful resources including The Foundation Center database of grantmaking institutions in the United States as well as other basic nonprofit capacity building resources and workshops.
- 2) **Professional Development Series** – A training series on a variety of topics customized specifically for those who work in the nonprofit sector.
- 3) **IMPACT (Inspiring Management, Program Accountability and Trust) Program** – A two-phase program beginning first with an Assessment Phase and then leading to the Capacity Building Phase where funds are granted to participating organizations for capacity development.
- 4) **Celebrating Organizational Success** – Bringing attention to high performing nonprofit organizations in a way that both affirms the successful organization and, at the same time, offers other nonprofit organizations the opportunity to learn from their “journeys toward organizational success.”

2006–2007 IMPACT Program Participants:

Centro Cultural de la Raza

Classroom of the Future Foundation

Community HousingWorks

El Cajon Community Development Corporation

Mo'olelo Performing Arts Company

SANDAN (San Diego Association of Nonprofits)

San Diego Housing Federation

San Diego Science Alliance

Urban Corps of San Diego

ONE ORGANIZATION'S SUCCESS: 2005 GRANTEE

THE SAN DIEGO RIVER PARK FOUNDATION

The San Diego River Park Foundation is a community-based organization that is dedicated to creating the San Diego River Park, a greenbelt from the mountains to the ocean that connects parks, open spaces and a trail system along the 52-mile San Diego River.

The San Diego River Park Foundation (SDRPF) works to acquire and manage critical properties that play an important role in creating the River Park. They support projects such as restoring and enhancing the river and its watershed, addressing flooding issues, and establishing public plazas and community gardens.

In 2005-2006, SDRPF undertook an extensive community outreach effort to increase public exposure to the River Park and the efforts of SDRPF. With a grant from The San Diego Foundation's Organizational Success Program Working Group, they developed outreach materials, restructured a staff position to include community outreach, and made presentations throughout the community to educate residents on their efforts.

The San Diego River Park is a project that will enhance the quality of life in San Diego. By raising public awareness of their mission and programs, SDRPF was able to increase both their donor and volunteer base thus ensuring the future progress of this regional asset.



Organizational Success Program

WORKING GROUP MEMBERS 2005-2006

CHAIR: **Raymond W. Smilor**
 VICE CHAIR: **Douglas G. Hegebarth**
 FOUNDATION STAFF: **Bob Kelly**, *President & CEO*
Lori Finch, *Resource and Development Manager, Organizational Success*

Douglas G. Hegebarth
President, Aviara, Inc.

Deborah Hoffman
Senior Vice President, Fund Services, The San Diego Foundation

Jerry Hoffmeister^(B)
President, Board of Trustees, EJE Elementary Academy
Retired executive in the high tech engineering industry

Jacqueline A. Ibrahim, Ph.D.
Chief Operating Officer, Sunset Coast Capital

Terry Loftus, Esq.
Partner, Law Offices of Herring and Loftus

James F. Reardon
Account Manager, Ab Initio Software Corporation

Lena Rodriguez, Ph.D.
Assistant to the President for Executive Affairs,
President's Office, San Diego State University

Allison Rossett, Ph.D.
Professor of Educational Technology, San Diego State University

Raymond W. Smilor
Executive Director, Beyster Institute, Rady School of Management,
UC San Diego

Kent H. Swedell
Retired, Human Resources Development, Solar Turbines

Rod Whitson
Chief Executive Officer, Townsend Agency

^(B) Board of Governors, The San Diego Foundation

NONPROFIT RESOURCE CENTER

Last year, 1,190 individuals visited the NRC, and another 240 attended NRC classes.

The Nonprofit Resource Center is a self-service library that is open to the public. An integral part of The San Diego Foundation's Organizational Success Program, the Resource Center assists local nonprofits in developing infrastructure and improving performance, thereby increasing their capacity to serve the community.

The Nonprofit Resource Center offers organizations and individuals access to databases, books, periodicals and research on:

Grant writing

Fundraising & development

Organizational management

Nonprofit board development

Starting a new nonprofit

Scholarships

Additionally, the Nonprofit Resource Center offers a series of introductory workshops designed to assist nonprofit employees. Pre-registration is required for all classes.

The Nonprofit Resource Center, formerly known as The Foundation's Funding Information Center, was established in 1984 and is a member of the New York-based Foundation Center.

For more information, please call or e-mail Sue Racanelli at (619) 235-2300 or sue@sdfoundation.org.

Workshops

Tuesdays at the Foundation

This monthly series covers fundraising, writing grant proposals, and the nuts and bolts of a successful nonprofit organization.

Getting Started with FC Search

This no-fee monthly class is on using the Foundation Center's database to search for funding opportunities nationwide.

Brown Bag Convenings

This is a seven part series that focuses on the elements crucial to nonprofit success.

HOURS

Library Hours

Monday-Friday, 8:00 a.m. to 5:00 p.m.

Wednesdays, 8:00 a.m. to 7:00 p.m.

Librarian assistance

Mondays, 9:00 a.m. to 4:00 p.m.

Wednesdays, 11:30 a.m. to 7:00 p.m.

No appointment necessary



LEADERSHIP

Since its founding in 1975, The San Diego Foundation has been led by some of the top community and business leaders in the region. Caring for the common good is a hallmark of the dedicated individuals who volunteer their time and expertise to ensure the stability and growth of this organization.



Tom Fat and Tom Murphy



Diane Coombs and
Sue Randerson



Frank Ault and
Carisa Wisniewski

Last year, The San Diego Foundation partnered with **250 local citizens** who volunteered nearly 9,000 collective hours on 28 different committees.

Foundation volunteers are deeply involved with every aspect of our work, such as overseeing investment strategies, conducting scholarship interviews, identifying community issues and opportunities for philanthropy, advising on policies and procedures, drafting funding guidelines and results expectations, and reviewing hundreds of grant applications.



Our staff organizes **hundreds of volunteer meetings**, providing packets of materials, minutes, research information and follow-up reports. As you may imagine, this is a significant commitment of resources. In contrast, many community foundations rely solely upon staff and program officers to conduct important business. *Why, then, does The Foundation make such an investment to involve volunteers?*

The answer is, our volunteers keep us connected to the many communities we serve, are a tremendous source of community knowledge, and help The Foundation act as a microcosm of the region. In addition to enhancing and extending The Foundation's base of skills and knowledge, **our volunteers are our ears, eyes, arms and legs throughout the region.**

The San Diego Foundation reaches deep into the community and knows it well. We greatly appreciate the time and talent that our volunteers so generously share with us for the benefit of our region.

BOARD OF GOVERNORS 2006-2007

Guided by a true and far-reaching concern for our community, the Board of Governors sets The Foundation's priorities and direction, and provides diligent oversight of The Foundation's charitable assets and grantmaking. The San Diego Foundation is fortunate to have this extraordinarily dedicated and generous group of leading citizens serving on its Board of Governors.



BRUCE G. BLAKLEY, CPA – CHAIR

Retired Partner, PricewaterhouseCoopers, LLP

With a strong sense of civic pride and community service, and over 30 years in business as a CPA with PricewaterhouseCoopers, Blakley brings inspiration and expertise to his new role as chair of The Foundation's Board of Governors and service on the Audit, Executive, and Compensation and Benefits committees.

Recipient of the San Diego County YMCA's Golden Triangle award for leadership, he previously served as a board member of the San Diego Venture Group, LEAD San Diego, The Japan Society of San Diego and Tijuana, and the Mission Valley YMCA. Blakley holds a bachelor's degree from Bowling Green State University and has completed graduate work in finance at SDSU. He is a LEAD San Diego graduate, former Navy officer, and member of the San Diego Rotary Club.



JOHN C. (JACK) RAYMOND – VICE CHAIR

Chairman & CEO of The Raymond Companies

With over 30 years in real property development, investment and management, Raymond lends his expertise to The Foundation's Executive Committee and is chair of the North Inland Civic Alliance, the San Diego Charitable Real Estate Foundation (CREF), and Escondido Cares—A Community Foundation. His regional involvement currently includes board service to the San Diego Regional

Economic Development Corporation, Mingei International Museum, University Council for California State University San Marcos, and the Escondido Education Foundation. Recently honored as San Diego Corporate Director of the Year for Nonprofits, Escondido Business Leader of the Year and Escondido Volunteer of the Year, his diverse leadership posts included chair of LEAD San Diego, California Center for the Arts, the Escondido Elementary Board of Education, and the Escondido Chamber of Commerce, among others. A graduate of Cornell University, he is also a retired officer in the US Army Reserve.



HON. RAFAEL A. ARREOLA – SECRETARY

San Diego Superior Court Judge

With a long history of assisting others and making an effort to improve the community in which he lives, Arreola currently serves as Judge of the Superior Court of California - County of San Diego, and as a nonprofit developer of low-income housing for seniors, the disabled and homeless. Through a scholarship fund at The Foundation, he also helps students residing in subsidized housing projects to further their education. Judge Arreola is secretary of The Foundation, chair of the Community Partnerships Committee and is a member of the Executive Committee. A former co-founder, member and president of numerous civic organizations and judicial associations, Arreola earned a bachelor's and master's degree from UC Berkeley, his law degree from Stanford University, and serves as a faculty member and team leader for California Judicial Education and Research.


RAYMOND V. (RAY) THOMAS – TREASURER

Community Leader

Thomas brings to The Foundation 33 years of financial management experience in the computer technology and software industry. He retired in 2000 after five years as chief financial officer of HNC Software, Inc., previously serving in senior financial management positions at several other high technology companies.

His extensive background ensures quality fiscal management at The Foundation

where Thomas currently chairs the Finance Committee and also serves on the Compensation and Benefits, Executive, North County Civic Alliance and Scholarship Selection committees. In the community, he has served on the boards of several information technology companies. Thomas holds a bachelor's degree from Purdue University and attended the Wharton School of Business at the University of Pennsylvania.


COLETTE CARSON ROYSTON, R.N., M.N. – IMMEDIATE PAST CHAIR

Partner, Carson-Royston & Associates, Inc.

With over 25 years' experience in cancer research, education and clinical practice, Carson Royston is actively involved at The Foundation as immediate past chair. She is a member of many committees including Board Governance, Community Partnerships and Executive, and last year served on the 30th

Anniversary Committee. She is a member of the Arts & Culture Working Group

and was involved with its launch in 2003. She is also a founding member of The San Diego Women's Foundation, and current board member for the San Diego Museum of Contemporary Art and San Diego Opera. Consultant to several biotechnology and pharmaceutical companies and special advisor to Sidney Kimmel Cancer Center, she has authored numerous publications, is past president of the National Oncology Nursing Foundation and board member of the National Oncology Nursing Society. She holds a BS from Brigham Young University, BSN from USD, and MN from UCLA as an American Cancer Society Scholar.


JENNIFER ADAMS-BROOKS

President, Clark Consultants

With over 20 years of experience in corporate communications, public affairs, training, legislative activities and strategic planning, Adams-Brooks brings quality leadership and organization to The Foundation's leadership. She is vice chair of the Civil Society Working Group and serves on the Board Governance and Community Partnerships committees. She was appointed to the San Diego

Housing Commission in 2002 and is currently president of Clark Consultants, a firm she established in 2000 that specializes in human resource consulting and executive coaching. Former posts include chief of staff for members of the State Assembly and City Council, and interim executive director for the Southeast Economic Development Corporation. She serves on several local boards including the UCSD Board of Overseers and the Springall Academy. She earned a bachelor's degree in communications and urban planning from UCSD.


FRED APPLGATE

Private Investor

With over 30 years of professional investment experience, Applegate is the co-founder of Nicholas-Applegate Capital Management and served as president until his retirement in 1992. He has lent his financial management expertise to The Foundation's Investment Committee since 1997, and currently serves on the boards of Nice Guys, the San Diego International Sports Council and the San

Diego Aerospace Museum Foundation. Applegate is a trustee of the Miami University Ohio Foundation and serves as chair of the Nicholas-Applegate Growth Equity Fund. He has held leadership positions in institutional marketing, portfolio management, trust investment and executive management at numerous financial institutions nationwide. Applegate earned both a bachelor's and master's degree in business administration from Miami University of Ohio and served as a captain in the US Air Force before he began his investment career.

**DENNIS ARRIOLA**

Senior VP and CFO, San Diego Gas & Electric and Southern California Gas Co.

In addition to serving as senior vice president and chief financial officer of Sempra Energy's California regulated utilities, Arriola actively contributes to The Foundation's Board Governance and Finance committees and serves as chair of the San Diego Teachers' Fund Committee. He has an extensive business background with leadership roles at financial institutions and energy companies.

Prior posts at Sempra include vice president of Communications and Investor Relations and president and general manager for South American operations. Arriola is on the board of The San Diego Symphony and is a trustee of the Tomás Rivera Policy Institute. He holds a bachelor's degree in economics from Stanford University and a master's degree in business administration from Harvard University.

**DARCY C. BINGHAM**

Community Leader

A self-described "philanthropreneur," Bingham believes in contributing to the community as an entrepreneur through active philanthropic involvement. A vocal catalyst for positive change, she is co-founder of San Diego Social Venture Partners and SVP International, a founding member of The San Diego Women's Foundation, board member of NTC Foundation, and is actively involved with the

UCSD Undergraduate Scholarship Council, and the National Intramural-Recreational Sports Association Foundation. A member of The Foundation's board since 2000, she chairs the North County Coastal Civic Alliance. Bingham's career in university administration concluded at UCSD, where she was director of operations, associate director of recreation, past president of the UCSD Staff Association, and had served at UC Regent meetings as chair of the UC System-wide Staff Council. She has a BA and BS from Arizona State University and did her graduate work at San Diego State University.

**ROGER C. CORNELL, M.D. INCOMING BOARD MEMBER**

Senior Consultant, Department of Dermatology, Scripps Clinic

Dr. Cornell is a practicing dermatologist with a passion for arts and culture. A graduate of Stanford University Medical School, he served in the Air Force before completing residencies in internal medicine and dermatology at UCSD. He joined Scripps Clinic in 1973 and is a Clinical Professor at UCSD. Recipient of many awards, he has authored over 80 publications and chapters. He has served as Vice

President for Quality Assurance and Academic Affairs at Scripps Clinic. Dr. Cornell volunteered at the UCSD Owen Clinic early in the AIDS crises, and has worked at the Logan Heights Family Health Center, for which he received the "Spirit of the Barrio" award twice. He has also served on the boards of Alliance Healthcare Foundation, Scripps Health Foundation, Mingei Museum, UCSD Art Gallery, and San Diego Performing Arts League. A member of the San Diego Arts and Culture Commission for eight years, he is chair of The Foundation's Arts & Culture Working Group.

**JAMES M. COWLEY**

Attorney, Luce Forward Hamilton & Scripps

Cowley brings more than 30 years of experience in estate planning, estate and trust administration, charitable giving, and representation of tax-exempt organizations to The Foundation's Compensation and Benefits and Executive committees. He continues to serve on the Professional Advisor Council, which he formerly chaired. Jim is director of the San Diego County YMCA, Chair of the

YMCA's Endowment and Planned Giving Committee, and is the director and officer of private foundations. His interest in nonprofit organizations led to service on the State Bar Committee that drafted the California Nonprofit Corporations Law. He has written and lectured extensively on estate planning, charitable giving and nonprofit organizations, is a Fellow of American College of Trust and Estate Counsel, and is listed in The Best Lawyers in America. Cowley holds a BS from Brigham Young University and JD from the University of Chicago Law School (Order of the Coif).

**MARTHA DENNIS, PH.D.***Principal, Gordian Knot*

Dennis lends her community-minded leadership and expertise in the technology industry to The Foundation's Executive Committee, Arts & Culture Working Group, and Science & Technology Working Group, of which she is vice chair. Prior to Gordian Knot, she was a venture partner with Windward Ventures; co-founder, president and CEO of WaveWare Communications; co-founder and vice president of Engineering at Pacific Communications Sciences; and assistant vice president at Linkabit. Dennis has served as president of the Board of Trustees of the Bishop's School, UCSD Athena and San Diego Telecom Council. She serves on the boards and advisory boards of several entrepreneurial ventures and is currently board president of the Reuben H. Fleet Science Center and chair of the City of San Diego Science and Technology Commission. A trustee at Harvey Mudd College, Dennis holds a BS from Smith College and PhD from Harvard University.

**DR. NORA FAINE***Vice President, Chief Medical Officer, Sharp Health Plan*

As former medical and executive director of the Comprehensive Health Center and current vice president and chief medical officer of Sharp Health Plan, Faine brings superior leadership and medical expertise to The Foundation's Health & Human Services Working Group, which she chaired for three years. Children and families in the community have been empowered through her advocacy as a San Diego County First 5 Commissioner, and she has been recognized for her commitment to public health by numerous community service organizations including Women Helping Women, the San Diego HIV Consumer Council, Soroptimist International organizations, Palavra Tree, Inc., and the San Diego Black Nurses Association. Faine earned a BS from USF, a master's in public health from SDSU and a doctorate in medicine from Meharry Medical College.

**THOMAS N. FAT***Attorney and President of Fat City, Incorporated*

As an attorney and president of Fat City, Inc., a family company with several restaurants in Sacramento and San Diego, Fat believes in working with neighborhoods on issues that affect them to create a better quality of life in the community. He brings his leadership and care for San Diego to The Foundation's Civil Society Working Group and Board Governance and Executive committees.

Honored with numerous awards from the business community, he is currently Advisory Board chair of the Asian Business Association, Steering Committee member on the San Diego Downtown Master Plan, SDG&E Community Advisory Council member, and co-chair of the Kyoto Symposium Gala. Past leadership posts include chair, San Diego Convention and Visitors Bureau; president, San Diego Restaurant Association; and service to many other community organizations. Fat received his BS from UC Berkeley, JD from Hastings, and LLM from NYU.

**JANE TREVOR FETTER***Community Leader*

A volunteer in the San Diego community for over 45 years, Fetter has been active with The Foundation's Scholarship Committee since 2002 and served last year as chair of our 30th Anniversary Celebratory Event. With a volunteer history of great scope and depth, including service with the Governor's Commission on Aging and chairing numerous community events, her community ties currently include board service with the San Diego Crew Classic Foundation and the Stanford University Athletics Board of Trustees. Fetter was honored as United Way Volunteer of the Year, March of Dimes Mother of the Year, Junior League Sustainer of the Year and the San Diego Woman of Dedication. She earned a bachelor's degree from Stanford where she was elected to Cap and Gown, an honorary scholarship and leadership organization.



WILLIAM K. (BILL) GEPPERT INCOMING BOARD MEMBER

Vice President and Region Manager, Cox Communications

Geppert brings vision and charismatic leadership to his role as Chair of *Endow San Diego* and, now, to The Foundation's board. With almost 30 years of experience in the communications industry, he has headed Cox Communications' San Diego system since 1996. Geppert is past chairman of the San Diego Regional Economic Development Corporation and currently serves on its board. He also serves on the boards of The Campanile Foundation and the University of San Diego, and is past chair of the San Diego Regional Chamber of Commerce and the California Cable & Telecommunications Association. Geppert has received numerous honors including the National Cable & Telecommunications Association national leadership award, the San Diego Business Journal Businessperson of the Year, YMCA Civic Leader of the Year, and the Union of Pan Asian Government's Courageous Leader of the Year award. He received his BA in social science from University of South Florida in Tampa and has completed Stanford's Executive Program.



THOMAS HALL

Partner, AlbertHall & Associates

With over 25 years in the San Diego arts community as a consultant, nonprofit arts administrator, teacher and commercial producer, Hall contributes a wealth of experience and expertise to The Foundation and its Arts & Culture Working Group. In addition to 20 years as the Managing Director of San Diego's Tony Award-winning Old Globe Theatre, he served as president and vice president of the League of Resident Theatres and on a number of public boards and commissions, including the California Arts Council, National Endowment for the Arts, and San Diego Commission for Arts and Culture. An honors graduate from the University of California, Hall is certified by the Institute for Cultural Affairs in group facilitation and organizational planning, and is a founding member of the American/Soviet Theatre Initiative and the Fieldstone Leadership Network.



GERALD E. (JERRY) HOFFMEISTER

Community Leader

After managing and expanding several global technology companies serving the energy industries worldwide until his retirement in 1997, Hoffmeister currently provides strategic support and mentoring to early stage technology companies and community nonprofit organizations. His very active leadership at The Foundation includes service on the Board Governance Committee, the Organizational Success Program Working Group, chair of the Science and Technology Working Group, and vice chair of the North County Coastal Civic Alliance. He is President of the Board of Trustees of EJE Elementary Academy and Chairman of the Board of Project Walk. Hoffmeister earned his bachelor's degree from Valparaiso University.



GARY JACOBS

Managing Director of Jacobs Investment Company LLC

Jacobs brings his expertise in investment management, community leadership and education to The Foundation's Board of Governors. Very active in the San Diego community, he serves as chairman of the Board of Trustees of the Gary and Jerri-Ann Jacobs High Tech High, and chair of the Dean's Advisory Council for Social Sciences at UCSD. He co-founded the Jacobs International Teen Leadership Institute, bringing together Jewish teens from San Diego and Israel, with Israeli Bedouins and Palestinians from Gaza. Jacobs serves on boards of the United Jewish Federation of San Diego County, Lawrence Family Jewish Community Center, San Diego Center for Jewish Culture, Jewish Community Foundation, JCC Association Continental Board and UCSD Board of Overseers. Jacobs is also co-chairing the 2008 San Diego JCC Maccabi Games. He earned a bachelor's in management science from UCSD.

**CONNY JAMISON***Former City Treasurer*

Having served 20 years as City Treasurer, managing collection and investment of over \$1 billion annually and trustee of a \$3 billion pension fund, Jamison is chair of The Foundation's Investment Committee and serves on the Executive Committee and Environment Working Group. She was president of the California Municipal Treasurers Association and was elected to the board of the

Government Finance Officers Association of the U.S & Canada. Her financial management and board leadership skills currently support various community businesses and organizations, including Neighborhood National Bank, the San Diego Kiwanis Club and its Foundation, and the San Diego Hospice Planned Giving Committee. With all coursework completed toward a doctorate in economics from the University of California at San Diego, Jamison also holds a master's degree from San Diego State University and a bachelor's from Occidental College.

**JEROME S. KATZIN***Retired Investment Banker*

A retired investment banker from Kuhn, Loeb & Co. and its successor firm, Lehman Brothers, Katzin brings to The Foundation's Investment and Executive committees a strong leadership background and a deep commitment to the San Diego community. Important past posts include president, UCSD Foundation; president, Board of Education in Great Neck, NY; board member of QUALCOMM

and of the Price Company; and senior staff of the US Securities and Exchange Commission. Former president of the Jewish Community Foundation and a director of the San Diego Symphony Board, he also serves as a trustee of the UCSD Cancer Center Foundation and of the UCSD Board of Overseers, and on the advisory boards of the Rady School of Management and UCSD Health Sciences. A Revelle Medalist from UCSD, Katzin has a BA and JD from the University of Chicago.

**DENISE LEW, PH.D.***Senior Licensing Officer, University of California, San Diego
Technology Transfer & Intellectual Property Services*

With over 20 years' experience in molecular biology and gene therapy as a researcher in the local biotechnology industry and in business development of university technologies, Dr. Lew provides both scientific expertise and business leadership to The Foundation's Science and Technology Working Group, which she chaired for two years, and Community Partnerships Committee. She is a founding and current member of the San Diego Women's Foundation, and her women's advocacy touches San Diegans through board service to the Girl Scouts San Diego-Imperial Council, in addition to participation in other women's professional organizations such as Athena and Association for Women in Science. Having earned her doctorate in biochemistry from the University of Illinois, she was a National Institute of Health-funded Postdoctoral Fellow at the Salk Institute.

**PAUL I. MEYER***Retired Partner, Latham & Watkins LLP*

A graduate of Harvard College (Phi Beta Kappa) and Harvard Law School, Meyer is a retired partner at Latham & Watkins LLP, where he focused on real estate law and finance. Repeatedly named as one of The Best Lawyers in America, Meyer has been the attorney for many prominent real estate projects in San Diego and beyond, including One America Plaza and Petco Park (San Diego), Staples Center

in Los Angeles, Sacramento Army Depot and, in Arizona, the Padres Spring Training Facility and Desert Mountain development. Meyer served as President of the Old Globe Theatre, the La Jolla Chamber Music Society, the American Jewish Committee, and as a member of the Board of Overseers at UCSD. He also served three years active duty as a Captain in the US Marine Corps Reserve. Meyer currently chairs The Foundation's Balboa Park Advisory Board and is a trustee of the San Diego Charitable Real Estate Fund.

**BARRY I. NEWMAN, ESQ.***Retired Banker & Attorney*

Newman has actively practiced law for the past 17 years, after a 27-year career in banking and financial services, and remains an active member of several state bars and a Judge Pro Tem for the San Diego Superior Court. He brings extensive experience to The Foundation's Audit, Community Partnerships and Executive committees, the Health & Human Services Working Group, and North County Inland Civic Alliance. In addition to serving as president of the County Civil Service Commission, vice chair of the Escondido Planning Commission, and chair of the San Diego County Treasurer Oversight Committee, he has held numerous positions in the community working toward government and organizational efficiency. Newman previously served as chairman and CEO of the Security Pacific Finance Group and as senior executive vice president and chief lending officer of Great America Bank. He received his bachelor's degree from Alfred University and his J.D. from New York University School of Law.

**STEVEN R. SMITH** *INCOMING BOARD MEMBER**Dean and Professor of Law, California Western Law School*

Guided by a deep belief in the importance of civic engagement, Dean Smith joined The Foundation's Civil Society Working Group in 2001 and has served as chair since 2004. Smith was appointed Dean of California Western Law School in 1996, following eight years as Dean at Cleveland-Marshall Law School. He is committed to educating "lawyers who will contribute to improving the lives of their clients and the quality of justice in our society," and has received awards for innovative teaching, research and distinguished service. He is former Deputy Director and remains active in the Association of American Law Schools and in the American Bar Association, as a member of the Council and current chair of the Section of Legal Education and Admissions to the Bar. Smith received his BA from Buena Vista College, MA and JD (Order of the Coif) from University of Iowa.

**EUGENE L. (GENE) STEP***Private Investor*

Step brings to The Foundation his desire to support science, technology and education to improve the quality of life in our region. A member of the Executive Committee, he previously served on the Community Partnerships Committee and as chair of the Science and Technology Working Group. Former executive VP and president of the pharmaceutical division of Eli Lilly and Company, Step has an extensive history of service and leadership to numerous pharmaceutical associations, foundations and companies, including chairing the National Foundation for Infectious Diseases. He is past chair of the UCSD Cardiovascular Center Advisory Board, board member of several corporations, and trustee of the Burnham Institute, UCSD Foundation, and California Western School of Law. Step holds a bachelor's degree from the University of Nebraska and a master's in accounting and finance from the University of Illinois.

**DANIEL SULLIVAN, PH.D.***Executive Vice President of Human Resources, QUALCOMM*

With an extensive background in human resources and communication, Sullivan brings his organization and leadership skills to The Foundation's board and Compensation and Benefits Committee. Serving as executive vice president for QUALCOMM, he has direct responsibility for the organization planning, compensation, benefits, learning, employee relations, corporate giving, staffing, and leadership development for 9,000 employees worldwide. Prior to joining QUALCOMM, Sullivan served in senior human resource management roles at leading companies in the technology sector. With a history of active community leadership, Sullivan presently serves on boards of the SDSU Research Foundation and the Economic Development Corporation. He holds BS and MA degrees from Illinois State and West Virginia University, and a PhD from the University of Nebraska.

**CARISA WISNIEWSKI**

Partner, Moss Adams LLP

Wisniewski brings over 17 years of public accounting audit experience to her current leadership role as vice chair of The Foundation's Finance Committee. She is a founding board member of the San Diego Foundation Regional Disaster Fund and was actively involved during the wildfires in October 2003. Last year, she expanded her Foundation involvement as a new member of the Science & Technology Working Group. Prior to joining Moss Adams as a partner, she took on a variety of roles at Deloitte & Touche including audit partner and national energy partner. She has extensive experience auditing public companies and emerging life science and technology companies. A member of the California Society of Certified Public Accountants and the American Institute of CPAs, Ms. Wisniewski earned a bachelor's degree in accounting from California State University at Fullerton.

**JOHN D. WYLIE**

Co-Founder, CapitalWorks Investment Partners, LLC

With over 24 years in the investment industry, Wylie brings his financial management expertise and community service values to The Foundation as vice chair of the Investment Committee and as a member of the Scholarship Selection Committee. Prior to co-founding CapitalWorks, he was president of Nicholas-Applegate Mutual Funds, chief investment officer of the Investor Services Group, lead portfolio manager of the Fund's Growth Income team, and he worked with the Metropolitan Life Insurance Company for several years. Wylie's financial expertise and care for the community extend to charitable giving and support of organizations in San Diego helping to preserve the environment, enhance civic pride, assist cultural development and further scholarship opportunities. He holds a bachelor's degree in American studies and graduated cum laude from Amherst College.

**ELIZABETH Y. YAMADA**

Community Leader

Active in the community for 40 years and a former business owner for 20 years, Yamada understands the changing needs and concerns of San Diegans. She brings her enthusiasm and experience to The Foundation's Community Partnerships Committee, and serves as vice chair of the Arts & Culture Working Group. Prior to service on numerous other committees at The Foundation and boards throughout the community, including NTC Arts & Culture Foundation, Family Literacy Foundation, UC Board of Overseers, and SDSU Department of Professional Studies & Fine Arts Advisory, she was partner-owner of Wimmer Yamada & Caughey, an environmental planning and architecture firm. She has also served on the boards of the National Japanese-American Memorial Foundation and Japanese American National Museum. She holds a BA from UC Berkeley and a California Secondary Teaching Credential.

**JAMES (JIM) ZIEGLER**

Community Volunteer

A community leader with over 25 years experience of banking throughout California and as a small business owner, Ziegler contributes his expertise to The Foundation's Executive Committee and The San Diego Regional Disaster Task Force. His leadership extends to current service on the board of AIDS Foundation San Diego and as a member of The San Diego HIV Funding Collaborative housed at The Alliance Healthcare Foundation. Previous community affiliations include board service for the La Mesa Chamber of Commerce, Mission Beach Precise Planning Board, Diversionary Theatre, El Cajon Boulevard Businessmen's Association, and The San Diego Lesbian Gay Bisexual and Transgender Community Center for which he as board chair in 2000. Ziegler earned his bachelor's degree from Miami University in Ohio, and is a U.S. Navy Viet Nam-era veteran.

OUTGOING BOARD MEMBERS



MURRAY H. HUTCHISON

Private Investor

With a long history of executive management, investment experience and community service, Hutchison served on The Foundation's board and multiple committees since 1999. Most recently he was a member of the Compensation & Benefits and Investment committees, and will continue to serve on the board of the San Diego Charitable Real Estate Foundation. He is actively involved in the community as vice chair of the board of YMCA-San Diego County and National Armed Forces YMCA, and is a board member of the Rancho Santa Fe Foundation and UC Berkeley Haas Graduate School of Business. His service extends to numerous corporations, including board chair of Huntington Hotel Corporation and Research Design, Inc., and board member of Cadiz Inc. and Jack in the Box. A former trustee of the UC Berkeley Foundation and past chair of the International Technology Corporation, Hutchison has a BS in economics from UC Berkeley and BA in foreign trade from the American Graduate School of International Management.



STEPHEN L. WEBER, PH.D.

President, San Diego State University

Weber is an active member of the community wherever he lives and joined The Foundation's board in 1999. He served on the Community Partnerships and Teachers' Fund committees, and was a past chair of the Civil Society Working Group. His community involvement is extensive and includes board service for The Peres Center for Peace, San Diego Regional Economic Development Corporation, San Diego Science and Technology Council, San Diego Performing Arts League, chair of the American Association of State Colleges and Universities, and is Honorary Director of the Japan Society of San Diego and Tijuana. He is also involved with the San Diego Unified Schools, California Health Institute, YWCA, and is a recipient of the San Diego Mediation Center's Peacemaker Award. Weber earned a PhD in philosophy and has held numerous faculty and leadership positions, including that of president and provost, at several universities nationwide.

PAST BOARD OF GOVERNORS

PAULINE DES GRANGES

(1914-2005)



In October 2005, The San Diego Foundation said good-bye to a great community leader and one of its 21 founders, Ms. Pauline des Granges.

Just a week prior, Pauline participated in The Foundation's 30th anniversary celebration (see page 9) where she and five of the other original founders were honored by 1,400 people with a tribute and standing ovation.

It was one of her finest moments," said Kay North, a longtime friend. "She was absolutely majestic, just beaming, and wearing her signature blue. It gave us a marvelous last view of her."

"Like Balboa Park, Mission Bay and other recreational and cultural amenities that she helped nurture, Pauline des Granges was considered a San Diego treasure."

— UNION TRIBUNE, OCTOBER 22, 2005

Founding Board of Governors and Officers are listed in blue.

Michel Anderson

[James W. Archer](#)

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Philip C. Blair ^{CH}

Ron Blair

[William F. Black](#)

[John F. Borchers](#) *

[Anderson Borthwick](#) *

Robert Breitbard

F. Seth Brown

Clair W. Burgener

Esther Burnham

[Malin Burnham](#)

Victor Calderon

Robert Caplan

Elizabeth H. Carson

The Honorable Federico Castro

Andrew W. Chithea

J. Dallas Clark ^{CH} *

Mary H. Clark

Robert B. Clelland

Phil Creaser *

F. P. Crowell

Junko Cushman *

Philip Del Campo

[Pauline des Granges](#) *

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Dean R. Dunphy

Paul Ecke, Jr.

[Carl M. Esenoff](#) *

L. Mark Fingerlin

David G. Fleet *

Preston Fleet *

Edward S. Fletcher

[Willis H. Fletcher](#) *

Ron L. Fowler

Sister Sally Furay ^{CH}

[The Honorable Theodore E. Gildred](#) ^{CH} *

[James M. Gillean](#)

[Robert M. Golden](#) *

Howard Goldfeder

Michael Ibs Gonzalez ^{CH} *

Brian H. Gowland

Ronald E. Hahn ^{CH}

Anita S. Harbert, Ph.D.

Alice Bourke Hayes, Ph.D.

Daniel D. Herde

Joseph W. Hibben ^{CH} *

[Edmund W. Hill](#)

Sandra Fleet Honnen

Murray H. Hutchison

William Jeffery, III

R. Page Jones

Ira R. Katz *

Linda L. Katz

Edmund L. Keeney, M.D. *

The Honorable Judith N. Keep *

Albert A. Kercheval

[Philip M. Klauber](#) ^{CH}

Herbert G. Klein

H. William Kuni

James U. Lemke, Ph.D.

Richard C. Levi

Hope Logan *

Susan A. Maddox ^{CH}

Art Madrid

Gloria McColl

John McColl

R. Michael McCraw

William J. McGill, Ph.D. *

Robert McRann

John D. Messner

The Honorable Amalia Meza

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[Donald L. Morgan](#)

[James F. Mulvaney](#) ^{CH}

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Thomas P. Murphy

William E. Nelson

Elinor Oatman *

Ralph R. Ocampo, M.D.

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B. James Polak

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David J. Primuth

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[Dwight E. Stanford](#) ^{CH}

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J. Stacey Sullivan, Jr.

A. Eugene Trepte

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Walter A. Turner, Jr.

Donald O. Van Ness *

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Barbara G. Walbridge

Mary Lindenstien Walshok, Ph.D. ^{CH}

Joanne Warren

Maurice T. Watson, Esq. ^{CH}

Stephen L. Weber, Ph.D.

Susan Fleet Welsch

Elsie V. Weston

Harold B. Williams

Su-Mei Yu

Past Executive Directors

Sophia Gorham

[Dan O. Henry](#) *

Helen R. Monroe

John F. Ramsey

[Robertston Whitemore](#)

(^{CH} = former chair, * = deceased)

VOLUNTEERS & COMMITTEES 2005-2006

**COMMUNITY IMPACT
WORKING GROUP &
SCHOLARSHIP COMMITTEES****Arts & Culture Working Group**

See page 44

Civil Society Working Group

See page 46

Environment Working Group

See page 48

**Health & Human Services
Working Group**

See page 50

**Organizational Success Program
Working Group**

See page 58

**Science & Technology
Working Group**

See page 52

**San Diego Teachers' Fund
Committee**

See page 55

Scholarship Selection Committee

See page 55

LEADERSHIP COMMITTEES**Audit Committee**

Edward Kitrosser, Chair

Bruce Blakley

Daniel Herde

Paul Hering

Barry Newman

Tracy M. Sandoval

William Ward

Board Governance Committee

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Jennifer Adams-Brooks

Dennis Arriola

Bruce Blakley

Robert Caplan

Julie Dubick

Thomas Fat

Jerry Hoffmeister

Mary Walshok, PhD

**Community Partnerships
Committee**

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Jennifer Adams-Brooks

Bill Carpenter

Diane Coombs

Roger Cornell, MD

Alicia Foster

Douglas Hegebarth

Denise Lew, PhD

Amy Okamura

Elizabeth Yamada

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James Cowley

Murray Hutchison

Colette Carson Royston, RN, MN

Daniel Sullivan, PhD

Raymond V. Thomas

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James Cowley

Martha Dennis, PhD

Thomas Fat

Conny Jamison

Jerome Katzin

Barry Newman

Jack Raymond

Colette Carson Royston, RN, MN

Eugene Step

Raymond Thomas

James Ziegler

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Carisa Wisniewski, Vice Chair

William Allen

Dennis Arriola

James Cahill

Daniel Gatto

Ardyce Jarvis

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Conny Jamison, Chair

John Wylie, Vice Chair

Fred Applegate

Robert Clelland

Ted Cranston

Howard Goldfeder

Murray Hutchison

Jerome Katzin

Bob Kelly

Carolyn Taylor

Daniel Wimsatt

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Darcy Bingham, Chair

Jerry Hoffmeister, Vice Chair

Gini Craig

Ramona Finnila

Gary Hill

Ann Hunter-Welborn

Joan Moss

Ron Moss

Thomas Nunan

Colleen O'Harra

Kari Perry

Hollyce Phillips

Ted Tarbet

Kathy Winkler

Mark Winkler

North County Inland Civic Alliance

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Jeanelle Brecht

Juanita Hayes

Kenneth Hugins

Steve Lilly

Kenneth Lounsbery

Harvey Mitchell

Barry Newman

Raymond Thomas

Paul Van Elderen

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Alfonso Arias

Terry Banks

Bill Beamer

Lisa Betyar

Michele Burgart

James Cowley

Rick Evans

Victor Ferrette

Judith Hamilton

Ann Harris

Nancy Henderson

David Hickson

Julie Keeney

Edward Kitrosser

Judy Kolodny Pressman

Karen Ladner

Michael Lerner

Chris Meacham

Kathryn Newnham

Mary Peshel

Robert Pizzuto

Richard Rojeck

Lon Showley

Timothy Skorheim

Nancy Spector

Alan Talbott

Paul Temby

Perry Wright

**30th Anniversary Celebration
Committee**

Jane Trevor Fetter, Chair

Noreen Mulliken, Co-Chair

Marty Allenby

Nancy Boyd

Shari Cairncross

Mary Lou Castagnola

Anne Chambers

Carol Chang

Berneice Copeland

Liz Copley

Julie Dubick

Jeanne Eigner

Kate Engler

Marilyn Fletcher

Chris Fontana

Alison Gildred

Ann Glazener

Alyson Goudy

Tory Gulley

Judy Hodges

Patti Holmes

Deborah Horwitz

<p>Susan Houser Ann Jessop Debi Kelly Gale Krause Donis Lovett Donna McClay Laurie McGrath Karen Miller Rita Moller Lollie Nelson Kay North Elizabeth Oliver Sue Raffee Monique Ramsey Lisa Richards Marty Ries Rosemary Rodger Colette Carson Royston, RN, MN Marilyn Allen Sawyer Sara Jane Sayer Kathin Smith Sandy Walrod Margie Ward Pattie Wellborn Diana Wheatcroft Cindy Wollaeger</p>	<p>COMMUNITY FUNDS</p> <p>Balboa Park Advisory Board</p> <p>Paul Meyer, Chair Pam Crooks, Vice Chair Anthony Block Deni Carpenter Lesley Cohn David Contois Susan Favrot Anna Belle Gabbs Phil Klauber, Emeritus Member David Lynn Janet McDonough, Esq. Kevin Munnelly Gene Trepte C. J. Paderewski James Waters B.J. Williams</p> <p>Mission Bay Advisory Board</p> <p>Steven McDonald, Chair Diane Coombs, Vice Chair Bruce Bradbeer Andrew Lissner, PhD Michael Thiemann</p>	<p>Rancho Bernardo Community Foundation Board</p> <p>Jim Hyldahl, President Steve Riddle, Vice President Dee Dee Hill Maureen Anderson Bill Bonner Eileen Haag Larry McIntyre Don McLean Larry Saunders Don Schmidt Mike Stelman Bob Wells</p> <p>Riford La Jolla Community Fund Advisory Committee</p> <p>Lee Vida, MD, Chair Marc Lanci, Vice Chair Blair Blum Patricia Lynch Camille McKinnie Glen Rassmussen Robert Teaff Lt. Col. Ret. Littleton Waller Kaye Woltman</p>	<p>AFFILIATED ORGANIZATIONS</p> <p>Partner Organizations</p> <p>San Diego Charitable Real Estate Foundation (CREF)</p> <p>Through the San Diego Charitable Real Estate Foundation, The San Diego Foundation offers individuals an easy option to give real estate.</p> <p>BOARD</p> <p>Jack Raymond, Chair Paul Meyer, Vice Chair Michel Anderson Daniel Herde Linda Hersh Murray Hutchison Robert Kelly Lynn LaChapelle Charles Miller Tomas Morales James Polak David Thomas</p> <p>The San Diego Women's Foundation</p> <p>The San Diego Women's Foundation (SDWF) is a group of over 250 dynamic women who pool their philanthropic resources and, together, provide significant grants to organizations dedicated to improving life in the San Diego region.</p> <p>BOARD</p> <p>Alicia Foster, President Vicki Baron Marlowe Berg Christa Burke</p>	<p>Carol Chang Susan Christopher Courtney Ann Coyle Dana Dahlbo Julie Dubick Wendy Gillespie Jacqueline Ibrahim Marsha Lubick Cindy Olmstead Sigrid Pate Marilyn Sawyer Jackie Slotkin Bethel Weiss Pam Werner Barbara Whitesides Kyla Winters</p> <p>Supporting Organizations</p> <p>Price Scholarship Program</p> <p>The Sol Price Retailing/Service Scholarship provides financial and academic assistance to students from San Diego to complete an associate degree while gaining valuable experience through structured community service activities.</p> <p>BOARD</p> <p>Robert Price, Chair Larry Brown Cecilia Estrada Anita Harbert Stephen Klink Kevin Munnelly Brene Patrick Frank Petersen Karen Wroblewski</p>	<p>San Diego Regional Disaster Fund</p> <p>The San Diego Regional Disaster Fund was created by The San Diego Foundation to prepare for regional crises as well as to make grants to nonprofit organizations that provide relief to the San Diego region during and after a disaster.</p> <p>BOARD</p> <p>Ted Chan, MD, Chair Barry Newman, Vice Chair James Bliesner Robert Clelland Janie DeCelles Bob Kelly Carisa Wisniewski James Ziegler</p> <p>San Diego Social Venture Partners</p> <p>San Diego Social Venture Partners invest their time, talents and resources to help non-profits accomplish their mission. They contribute in areas such as mentoring, technology, finance, strategic planning, fund development, legal, marketing and more.</p> <p>BOARD</p> <p>Bill Carpenter, Chair Alan Sorkin, Vice Chair Karen Braillean Richard Bockoff Trevor Callan David Field Marjorie Fox Katherine Kennedy Michael Kole Charlene Pryor Camille Sobrian Dale Stein</p>
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THE SAN DIEGO FOUNDATION STAFF 2006-2007

EXECUTIVE DEPARTMENT



BOB KELLY
President & CEO



BARBARA DAVIES
Executive Coordinator



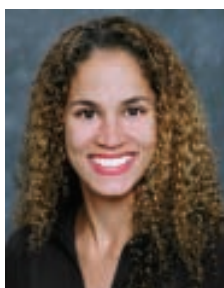
LINDA KATZ
Director,
Regional Outreach



JOHN DUCA
Regional Manager,
North County Coastal



HEATHER DUGDALE
Regional Manager,
North County Inland



MISTI BOUTWELL
Administrative Assistant,
Regional Outreach



DUANE DRAKE
Chief Financial Officer



ELIZABETH CORROW
Finance Manager



CARREL CREMANS
Staff Accountant



SARAH SLAUGHTER
Vice President,
Finance & Administration



ANNE KILPATRICK
Human Resources
& Payroll Manager



CHRISTINA NAVARRO
Finance Assistant



BYRON COOK
Director,
Information Technology



AMY MERROW
Human Resources
& Training Manager



MELODY STUART
Accounts Payable Administrator



MICHELLE CAPARAS
Database and Intranet Manager



MIKE PATTISON
Accounting Supervisor



SANDRA THOMPSON
Receptionist

FINANCE & ADMINISTRATION

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Vice President, Charitable Giving



DAVID JAFFER
Associate Vice President,
Endowments & Planned Giving



BERIT DURLER
Executive Director, The San Diego
Charitable Real Estate Foundation



CANDI KIZER
Charitable Giving Coordinator



AMY WALLING
Director, Research



ADAM SMALLEY
Planned Giving Consultant

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Senior Vice President,
Fund Services



SIMONA VALANCIUTE
Senior Manager, Fund Services



VANESSA NIEVES
Fund Services Coordinator



JULIE FRY
Associate Vice President,
Fund Services



LESLIE HARRINGTON
Grants Administrator

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SARA WILENSKY
Senior Vice President



SARA DUZIK
Marketing & Communications
Associate



ANAHID BRAKKE
Marketing & Communications
Associate



HEATHER BARTO
Public Relations Coordinator

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Senior Vice-President,
Community Partnerships



EMILY YOUNG, PH.D.
Associate Vice President, Community
Partnerships and Director,
Environment Analysis & Strategy



VALERIE ATTISHA
Director, Scholarships and
San Diego Teachers' Fund



SEDRA SHAPIRO
Director, Science & Technology
Analysis and Strategy



SHELLEY LYFORD
Research & Development
Manager



KERRI FAVELA
Executive Assistant



SHERYL HELVIE
Scholarships Coordinator



TRICIA THORP
Program Assistant



RUTH AMBRIZ
Administrative Assistant



MEREDITH CABELL
Tom Murphy Fellow, Community
Partnerships

ORGANIZATIONAL SUCCESS



SUE RACANELLI
Director, Funding Information
Center



LORI FINCH
Resource and Development
Manager



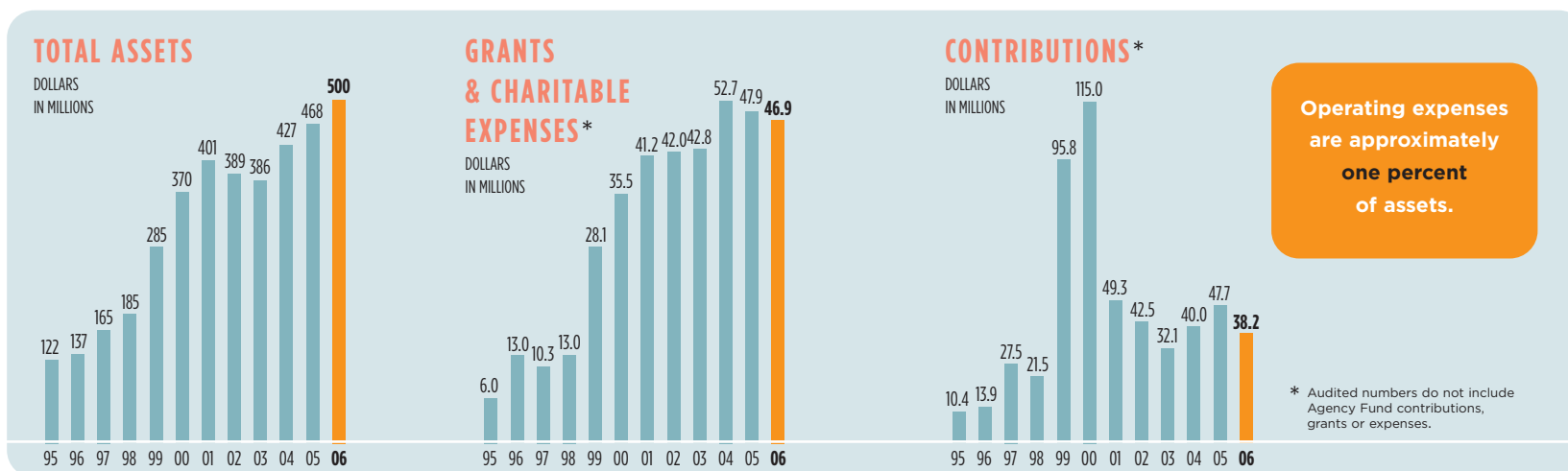
ERIN LAUDNER
Administrative Assistant

FINANCIAL HIGHLIGHTS

Founded in 1975 with assets of \$75,000, The San Diego Foundation today has assets of more than **\$500 million**.

Our commitment is to maintain and grow the charitable assets entrusted to us. The financial information contained in this annual report is a condensed version of the Fiscal Year 2006 audited financial statements. A complete set of the audited

financial statements, with accompanying notes and report from independent auditor Mayer Hoffman McManm P.C., is available at The San Diego Foundation office and on The Foundation's website.



BALANCE SHEET AT 6/30/06 DOLLARS IN MILLIONS

	6/30/06	6/30/05	6/30/04	6/30/03	6/30/02	6/30/01	6/30/00
ASSETS							
Cash & Cash Equivalents	17,424	16,529	12,333	38,871	61,317	56,646	65,090
Investments	460,213	429,185	384,326	320,698	308,863	335,124	295,962
Other Assets	22,682	21,896	30,219	26,329	19,602	9,494	9,274
Total Assets	500,319	467,610	426,878	385,898	389,782	401,264	370,326

Our **Finance Committee** is responsible for monitoring the fiscal operations, policies and procedures of The San Diego Foundation.

Raymond Thomas - CHAIR^(B)
Retired Business Executive
Carisa Wisniewski, CPA - VICE CHAIR^(B)
Partner, Moss Adams LLP
William Allen
Retired Partner, PriceWaterhouseCoopers

Dennis Arriola^(B)
Senior Vice President & CFO, SDG&E and SoCalGas
James Cahill
Private Investor

Daniel Gatto
Partner, Gatto & Pope LLP
Ardyce Jarvis
Retired CPA

^(B) Board of Governors, The San Diego Foundation

ENDOWMENT INVESTMENT POLICY

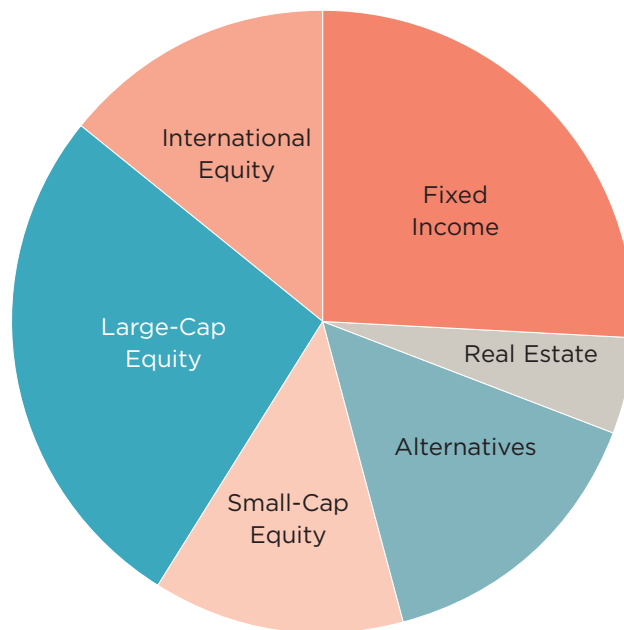
The San Diego Foundation's endowment funds are invested in a "Balanced Pool" portfolio, which is structured for long-term total return. To provide diversification and to reduce overall risk, the investments are divided into carefully defined asset classes.

Assets are invested by professional money managers hired by The Foundation through a competitive process. The investment performance of each money manager is monitored by an independent investment consultant retained by The Foundation and overseen by The Foundation's Investment Committee. A list of our current investment managers is available at The San Diego Foundation.

ENDOWMENT BALANCED POOL ASSET ALLOCATION

INCLUDES ENDOWMENT PRINCIPAL ONLY

● Fixed Income	26%
● Real Estate	5%
● Alternatives	15%
● Small-Cap Equity.....	13%
● Large-Cap Equity	27%
● International Equity	14%



Our **Investment Committee** ensures that The Foundation maintains a diversified portfolio of assets in order to meet investment return objectives and mitigate risk.

Conny Jamison – CHAIR^(B)

Former City Treasurer

John Wylie – VICE CHAIR^(B)

Co-Founder, CapitalWorks Investment Partners, LLC

Fred Applegate^(B)

Private Investor, Co-founder of Nicholas-Applegate Capital Management

Robert Clelland

President & CEO, Clelland & Company, Inc.

Ted Cranston

Partner, DLA Piper Rudnick Gray Cary LLP

Howard Goldfeder

Former Director, J.P. Morgan & Co

Murray Hutchison^(B)

Private Investor

Jerome Katzin^(B)

Retired Investment Banker

Carolyn Taylor

President, Weatherly Asset Management

Daniel Wimsatt

Founder, aAd Capital

Our **Audit Committee** provides assistance to the Board of Governors in fulfilling their oversight responsibility to the public relating to the internal accounting and financial controls and the annual independent audit of The Foundation's financial statements.

Edward Kitrosser – CHAIR

Managing Partner, Moss Adams LLP

Bruce Blakley, CPA^(B)

Retired CPA, PriceWaterhouseCoopers LLP

Daniel Herde

Retired Bank Executive and Director, The San Diego Trust Bank

Paul Hering

CEO, Barney & Barney

Barry I. Newman, Esq.^(B)

Attorney and Retired Banker

Tracy M. Sandoval

Asst. Chief Financial Officer / Auditor & Controller, San Diego County

William Ward

Retired Managing Partner, Ward & Associates

^(B) Board of Governors, The San Diego Foundation

CONTRIBUTIONS TO NEW AND EXISTING FUNDS

JULY 1, 2005 – JUNE 30, 2006

The San Diego Foundation wishes to thank and recognize our many donors whose generosity over the past year helped support a wide range of services and programs in our community. Although this list is limited to contributions of \$1,000 or more, all gifts are greatly appreciated and make a difference.



\$100,000 AND ABOVE

American Real Estate Enterprises, Inc.
Anonymous
ARTS: A Reason to Survive
William and Lucille Ash
Barrio Logan College Institute
James F. Beyster
Mary Ann Beyster
Charles and Charlotte Bird
Boys & Girls Clubs of National City
Marc and Patricia Bruten
California Wildlife Foundation
Jonathan Chait
Challenged Athletes Foundation
Dr. Clifford and Carolyn Beall Colwell
William S. Cowling
Cox Communications, Inc.
Joan Eichen
Escondido Creek Conservancy
Escondido Rotary Foundation
Dr. Peter C. Farrell / Farrell Family Foundation
Gateway Vista De Oro, LLC
Dr. David and Barbara Groce
H. G. Fenton Company
James W. Hirschmann
Michael and Dawn House

The James Irvine Foundation
Jerome and Miriam Manchis Katzin / Katzin Fund of the Jewish Community Foundation
Liz Keadle
Frederick J. Kiko
Lakeside's River Park Conservancy
Brian Colman Malk and Nancy Heitel
John McDonough
Christa McReynolds
Howard and Irene Nelson
North Coast Calvary Chapel
Otay Mesa Property LP
Janis Prupes
QUALCOMM, Inc.
Rancho Coastal Humane Society
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Photo by Ken Jacques



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